POS Expert Front
Restaurant Version

User Manual

Ver 1.23 21 Feb 2012

Revision Sheet

Release No.	Date	Revision Description
1.10	10/2/2012	Updated by Riche
1.20	15/2/2012	Added cover and index, content copied from quick start guide
1.21	16/2/2012	Update figure numbers and other fonts.
1.22	20/2/2012	Copied document from a quick installation guide
1.23	21/2/2012	Copied and added for “Options”

POS Expert Front Restaurant User Manual

Table of Contents

1 Welcome to POS Expert Front 4
1.1 Introduction 4
1.2 POS Expert Front Overview 4
1.2.1 Login 4
1.2.2 POS Expert Front Main Window 5
2 Preparations for POS Expert 6
2.1 Preparations set in POS Expert Back Office 6
2.1.1 Staff 6
2.1.2 Stock 6
2.1.3 Customer 6
2.2 Preparations set in POS Expert Front 6
2.2.1 EFTPOS Device 7
3 POS Expert Front Operations 8
3.1 Sale 8
3.1.1 Dine in Orders 8
3.1.2 Take Away Orders 10
3.1.3 Telephone orders 11
3.1.4 Enter products 13
3.1.5 Taste/Extra of a certain product 14
3.1.6 Change the quantity 17
3.1.7 Price/Quantity Modification 19
3.1.8 Payment Input 20
3.1.9 Finish your transaction 23
3.1.10 Delete a particular item 23
3.1.11 Clear the entire order 24
3.1.12 Membership card 25
3.2 Payment 26
3.2.1 Cash Payment 27
3.2.2 Card Payment 28
3.2.3 Mixed Payment 28
3.3 Advance POS Expert Front Operation 28
3.3.1 Discount Setting 29
3.3.2 Binding a Customer to the Sale 31
3.3.3 Void Item 32
3.3.4 Refund 33
3.3.5 Cash In/Out 35
3.3.6 Cash Up 36
3.3.7 EFTPOS Device 36
3.3.8 Sale Record 38
3.3.9 Price Level 39
3.3.10 Attendance 39
3.3.11 Other modules POS Expert Front 40
4 Options 40

4.1 General....40
4.1.1 Overview....40
4.1.2 Field Definition....41
4.2 Periperals....41
4.2.1 Overview....41
4.2.2 Field Definition....42
4.3 OPOS / EFTPOS....43
4.4 Payments....44
4.4.1 Overview....44
4.4.2 Field Definition....44
4.5 Prices....45
4.6 Membership settings....46
4.7 Display....47
4.8 Touch Keypad....47
4.9 Others....48

1 Welcome to POS Expert Front

1.1 Introduction

Welcome to **POS Expert Front**, and welcome to be a part of **POS Expert** family! This manual is best read by those who will be primarily concerned with the operation of the point of sale system: cashiers, store managers, sale associates, or other employees who will be responsible for the sales.

POS Expert Restaurant Version is a part of the POS Expert Family. It comprises of two main applications which are POS Expert Desk Front and POS Expert Back Office. The POS Expert Desk front features 3 main Functions like sales, customer traffic control and the management of the entire restaurant's running; The POS Expert Back Office is significantly for the managers or the owners to manage and maintain the relationship between restaurants and their suppliers and customers as well as the internal staff. In addition, POS Expert Back Office provides the function to view the kinds of previous sales reports which can focus on a particular product or a particular period.

1.2 POS Expert Front Overview

1.2.1 Login

Once you have finished your stock and customer as well as the staff information importing, you are able to utilize most of the functions of the POS Expert Desk Front. At the very beginning, find the shortcut of the POS Expert Desk Front which is named "POS Restaurant" on the desktop. Double click it and then you will see a "**Login**" window, typing the password which is also the staff ID, finish with one click of the green '**Ok**' button. Then the POS Expert Front Desk main window will be opened up immediately. Be aware that please keep your password secure all the time.

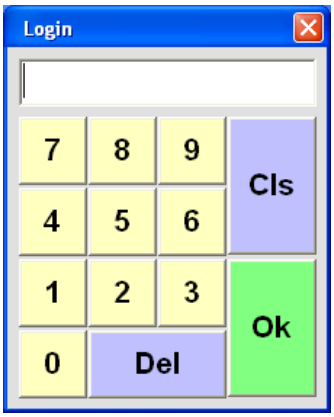


Figure 1

1.2.2 POS Expert Front Main Window

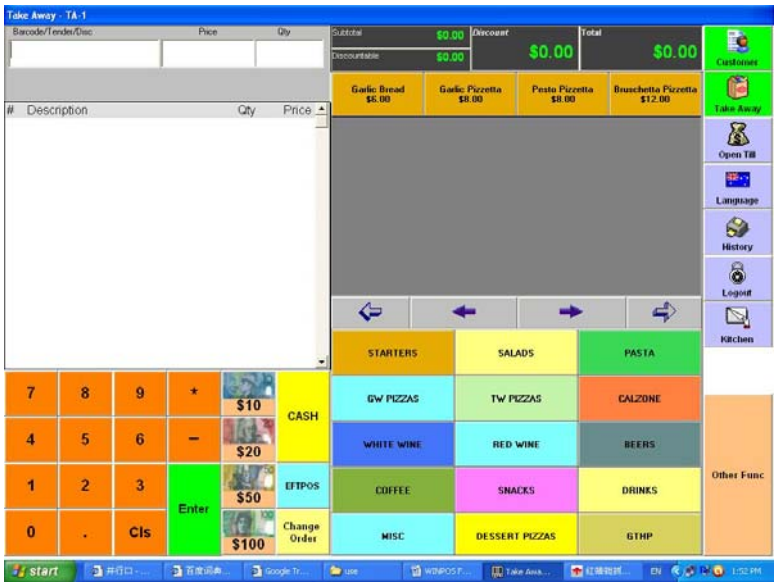


Figure 2

The **POS Expert Front** Main Window is shown above, with the five main areas of the screen. The four main areas of the POS screen are comprised of the following: **Scanning Panel**, **Sale Panel**, **Product Panel**, **Amount / Quantity Control Panel** and **Function Panel**.

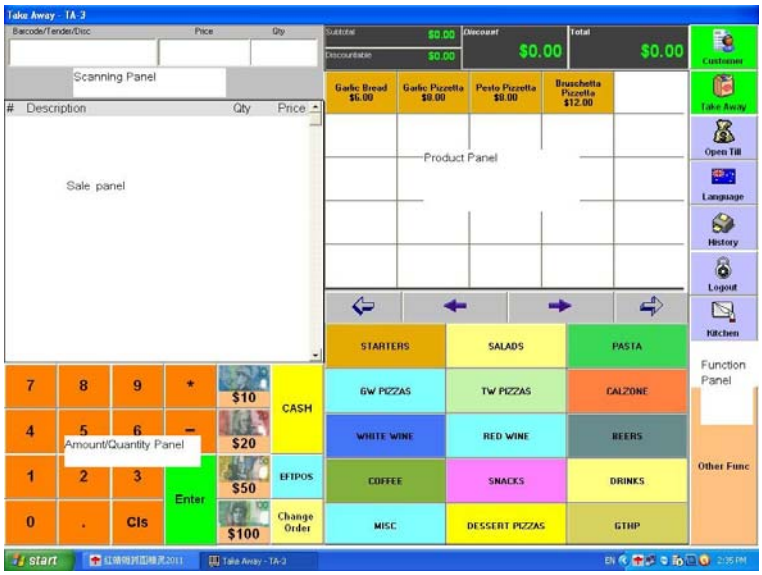


Figure 3

2 Preparations for POS Expert

Before using **POS Expert Front**, several preparations are required. All the preparations are necessary to run **POS Expert Front** smoothly.. Be aware that preparations do not contain installation.

2.1 Preparations set in POS Expert Back Office

Several preparations are set in **POS Expert Back Office**. They are the most crucial part of all preparations.

2.1.1 Staff

The Staff concept is important in both **POS Expert Front** and **POS Expert Back Office**. In **POS Expert** you are logged in using a staff number (Staff No). All the transactions and system maintenances tasks will record the staff number for review purposes.

Please refer to section **2.2** in **POS Expert Back Office** for more information.

2.1.2 Stock

Stock in **POS Expert** is considered as products with purchase/sale information such as barcode, price and inventory quantity. Without a **Stock** setting, you are not able to make a sale in **POS Expert Front**.

Please refer to section **2.4** in **POS Expert Back Office** for more information.

2.1.3 Customer

If transactions are associated with customers, you are allowed to review the transaction record group by customer. Further, **POS Expert Back Office** allows you to set up accounts for your customers with full reporting facilities, for example you can give a particular customer payment credit for sales.

Please refer to section **2.5** in **POS Expert Back Office** for more information.

2.2 Preparations set in POS Expert Front

Preparations set in POS Expert Front are optional. They are only necessary for some specific devices or specific actions.

2.2.1 EFTPOS Device

If you are using an EFTPOS Device, you need to enable the EFTPOS options in the Options window.

To open the **Options** window, click the **Other Func** button to open the other **Functions** window, then apply the **Options** button.

Figure 4

The Options window is shown in the above figure. Select the **OPOS/EFTPOS** page.

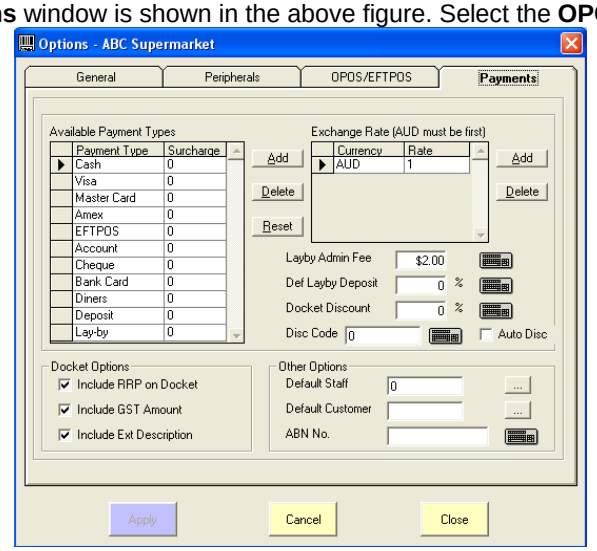


Figure 5

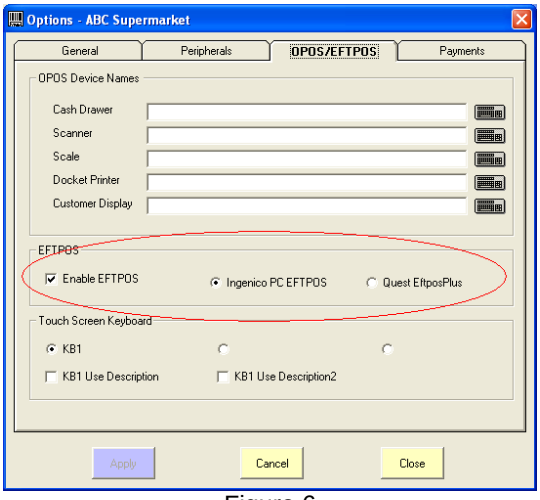


Figure 6

In the above figure, there is a check box for enabling EFTPOS called **Enable EFTPOS**, and two types of EFTPOS machine called **Ingenico PC EFTPOS** and **Quest EftpIsPlus** respectively. To enable the EFTPOS device, check the box first, then select the proper type of your EFTPOS machine and press **Apply** to confirm the settings.

3 POS Expert Front Operations

3.1 Sale

In this section, we are going to introduce the standard **POS Expert Front** Operation, including barcode scanning, price/quantity modification and payment input. These steps are the basic skills for you to be a professional user of our POS Expert system. Like other popular software in the computer world, **POS Expert Front** operation is as easy as you pressing the “Enter” key!

Usually, customers have three main options to consume products in a restaurant:

- Dining in orders
- taking away orders
- Telephone orders

POS Expert therefore provides different buttons on the main window for dealing with different types of the customers to distinguish the process of the different actions.

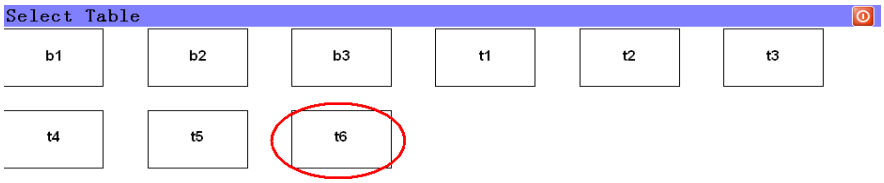
3.1.1 Dine in Orders

When the customers coming into the restaurant, the first you need to do is to ask the idea table that they want to be seated or arrange an appropriate table for them. To operate on the POS Expert：

Simply click the “Dine in” button once which is on the top right hand corner of the screen.

Figure 7

Choose the right table number in the coming window by one click on the desired table.



Suppose we choose table ‘t6’ so that we just click on the ‘t6’ straightaway.

Figure 8

If there are 5 people coming for dinner, click the 5 button once followed by one click of the green “Enter” button.

Figure 9

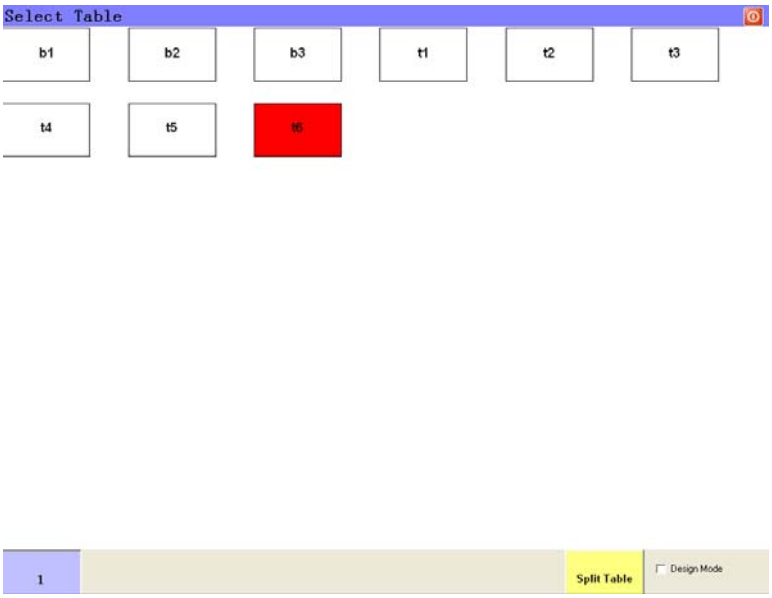


Figure 10

Now you can take orders for the customers on the next coming screen. Certainly, whenever you want to check the status of each table within the restaurant, especially during the rushing hours, just go back to the “dine in” window and then you can identify which table is available (in white) for customers or occupied (in red).

3.1.2 Take Away Orders

Customers also can take food away rather than sit in the restaurant**.**

1. Click the “Take Away” button (

) from the top right hand corner of the main screen.
2. On the coming screen, click the “Take Away” button, then you are able to choose the dishes of what the customers want from the current window. Also, you can identify the order number which is on the left top of the screen.

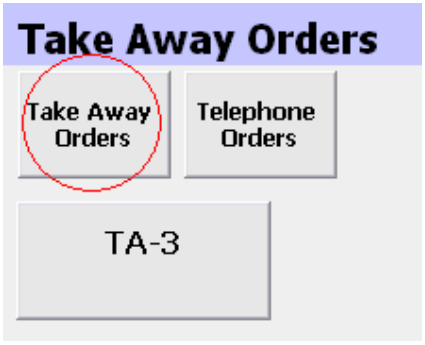


Figure 11

3.1.3 Telephone orders

Taking telephone order is pretty much same like dealing with the taking away order.

1. Once you get an order on the telephone, click the “Take Away” button once.
2. Choose “Telephone Orders” from the coming window.

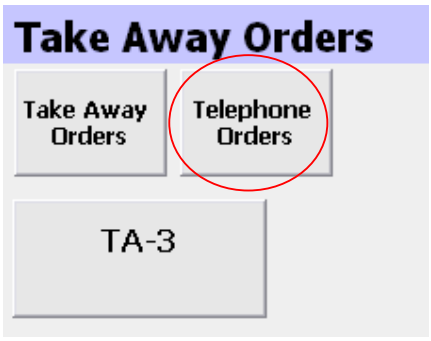


Figure 12

3. Then you will see there is another window coming up which is called “customer”. Ask for the phone number from the customer and then put it into the single table named “Cust. No.” by using the on-screen keyboard which is on the bottom of the current window.

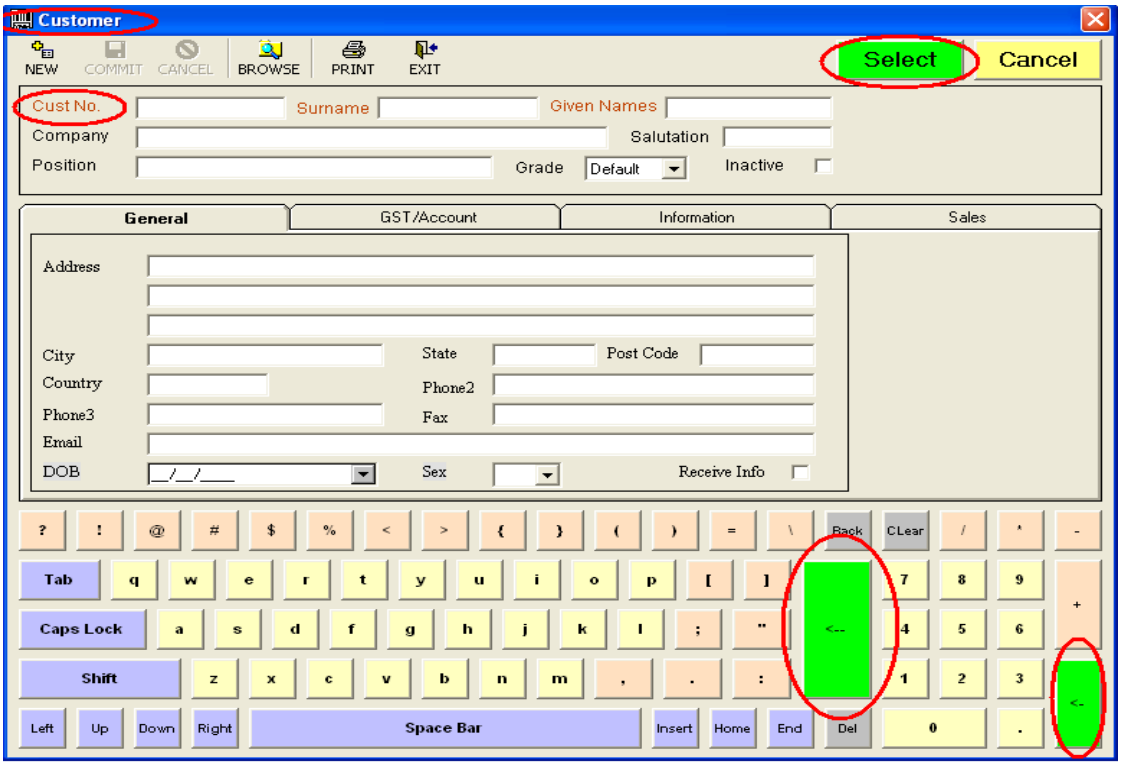


Figure 13

4. One click the green “Enter” button, there are two possibilities that could happen.
    - If the customer exists in your database already, all the information about this particular customer will come up to the window automatically, what you need to do is just one click of the green “select” button from the top right hand corner of the screen and then you can proceed to take orders from the customer.
    - However, if you are dealing with a new customer, the system would tell you that the customer is not found, do you want to create it. Select “yes” to proceed, then put the customer’s basic information like family name, given name, etc. into the tables, finishing with one click of the “commit” button which is in the top left hand corner of the window.

The next coming window is the same like the one presented above. And you can identify this order is for which person from the left top of the screen.

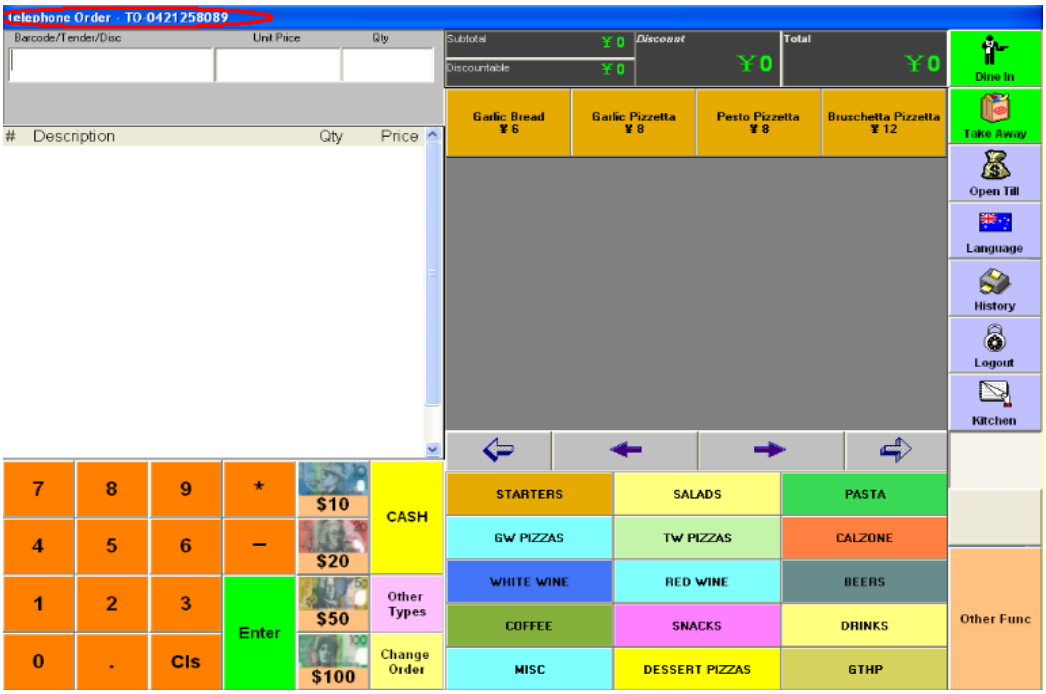


Figure 14

3.1.4 Enter products

When the main window loads, your cursor will be initially located in the **Barcode** field

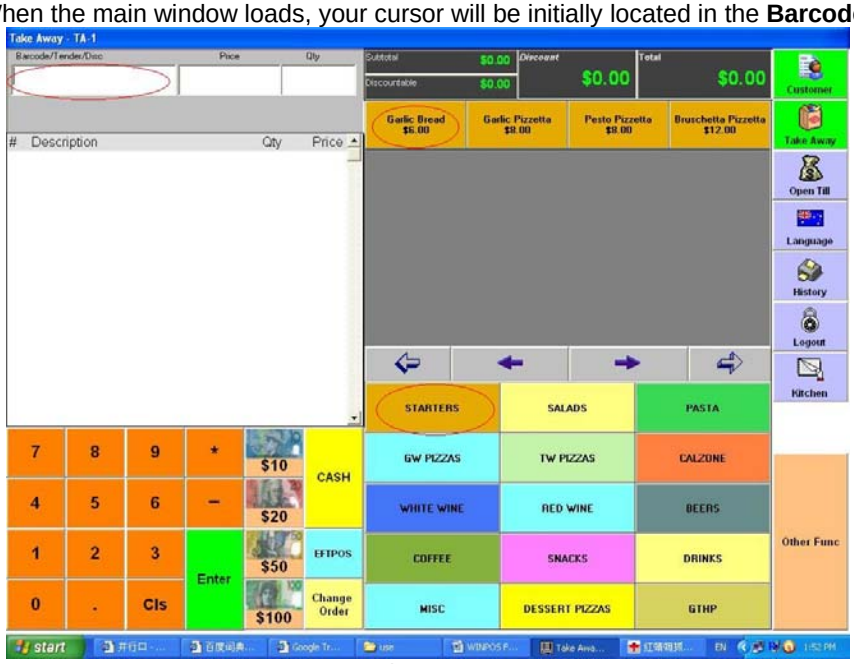


Figure 15

There are three ways to enter the products.

- When the cursor is in this field, you can simply scan the barcode.
- You can enter the product barcode by keyboard or touch keyboard

- You can also click the category on screen, then click the product panel to select the product

Once the item is found, it will be shown in the Sale Panel as in the following figures.

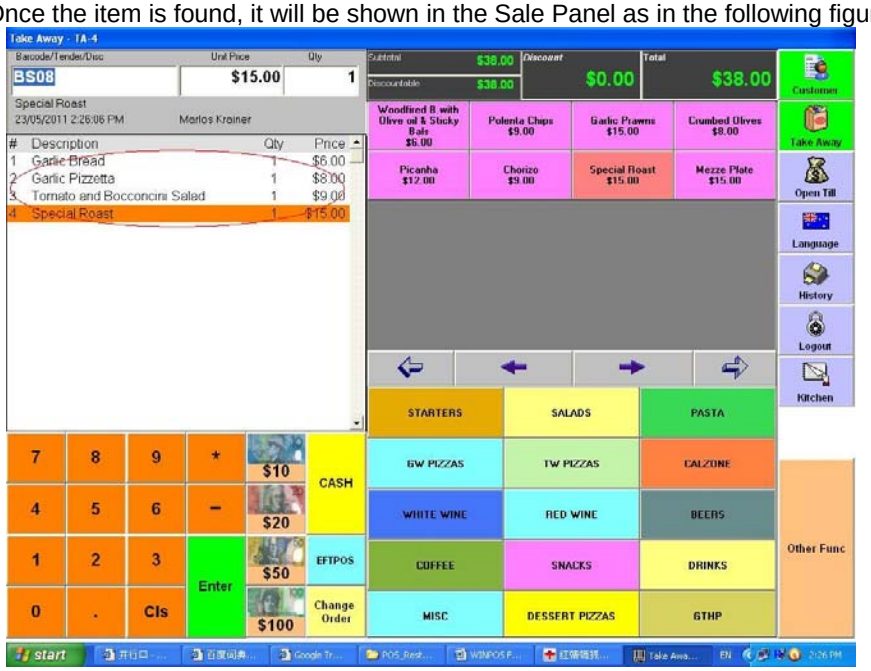


Figure 16

If it is not necessary to modify the price and quantity, you can keep entering the items until you get to the payment step. Otherwise, read through the next section **Price/Quantity Modification** for more information.

3.1.5 Taste/Extra of a certain product

Customers are entitled to ask for the choices of flavours or some extra stuff. Sometimes for a particular product, it may have several options for the ingredients and flavours so that customers can choose their favourite ingredients and flavours from the restaurant's available options. The operation regarding this is demonstrated as following:

1. Customer orders a medium size BBQ chicken Gourmet Wood fire Pizza. Find the "GW Pizzas" from the category buttons and click it. Now all kinds of pizza belonging to this category have been shown on the screen.

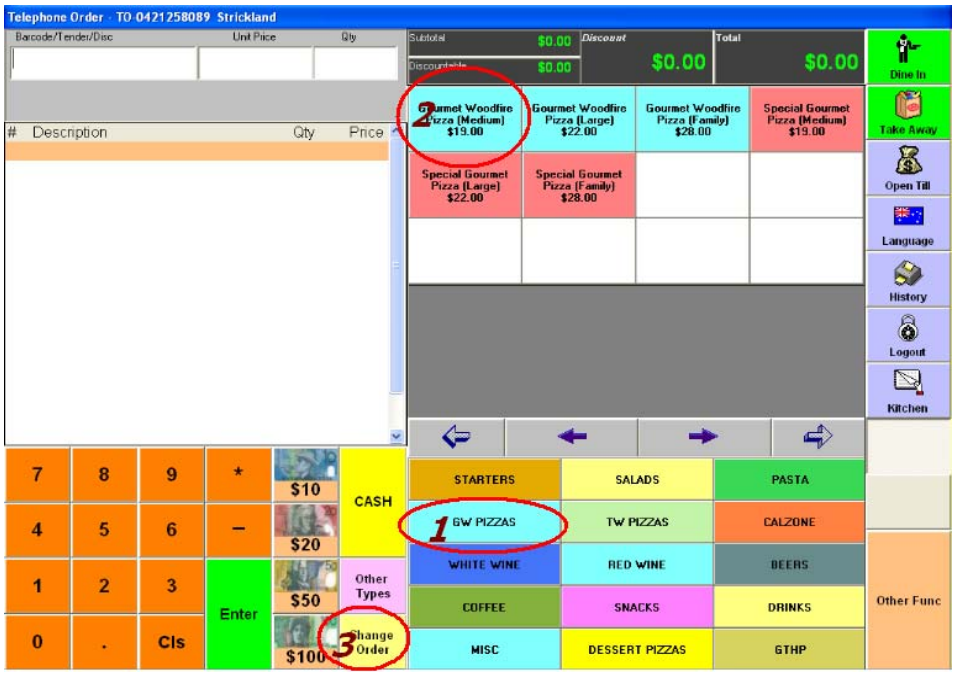


Figure 17

2. Click the first one “Gourmet Woodfire Pizza (medium)” which is what the customer wanted. At the next coming window, all kinds of GW Pizzas have been listed on the screen, tick the BBQ chicken from those and then press the ‘OK’ button. Then you will see the “Gourmet Wood fire Pizza (Medium)” with “BBQ Chicken” has been shown on the order list area.

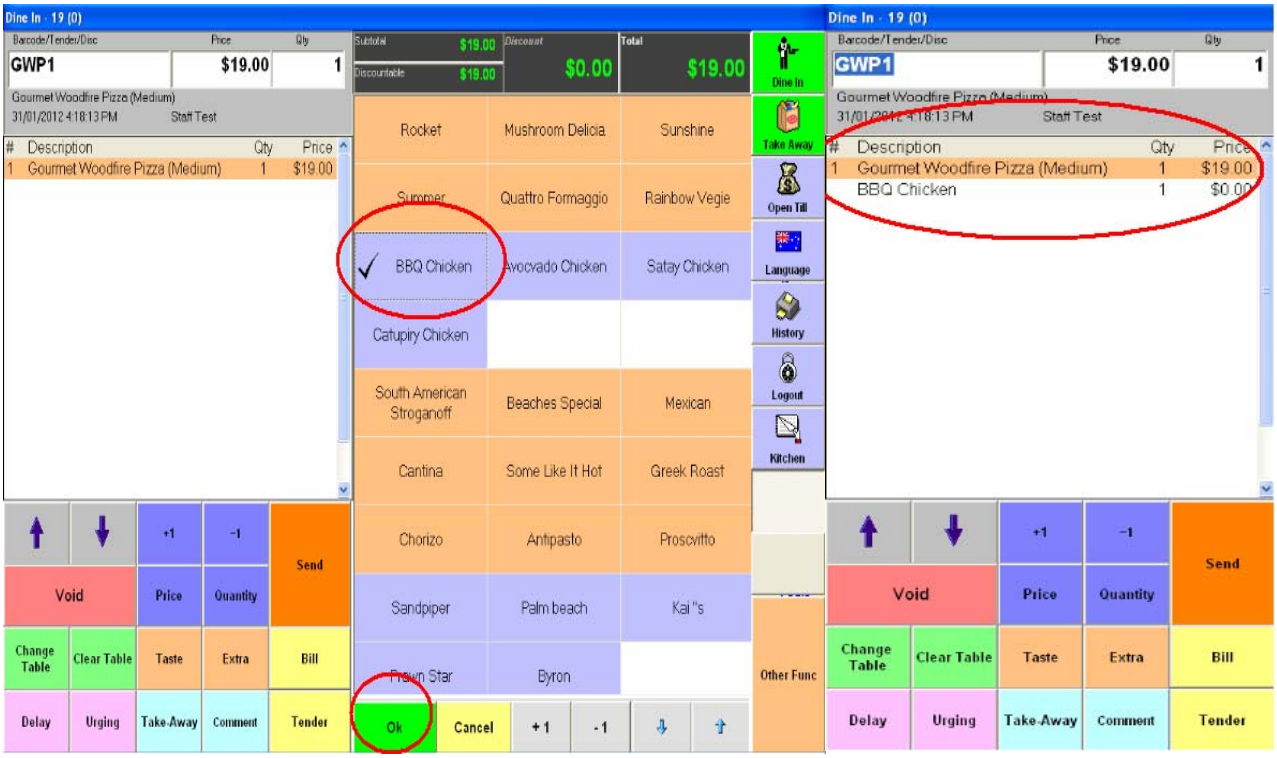


Figure 18

3. Click the ‘change Orders’ button once and you will see the function panel coming up.
4. Sometimes customers have their own preferences on taste and flavor. The system therefore provides the options of special flavor for customers. As we mentioned above, customer ordered a medium size “Gourmet BBQ chicken pizza” which contains some garlic, feta cheese and some herbs on the original recipe. If the customer does not like the garlic, feta cheese and coriander on the pizza, simply highlight the specific item by one touching from the orders window and then find the “Taste” button below the orders window. Click it once and you will find out all the special tastes have been ranked on the right hand side of the screen. Tick the options of “No garlic”, “No feta” and “No coriander” from them finished with one click of the green “ok” button on the bottom. A customized order has been done and you will see all the options according to the customer’s request have been listed on the orders window.

Figure 19

5. Certainly, if customers want to put some extra stuff on their ordered products, you are able to do it in a similar way like changing the “taste” mentioned above. Find the “extra” button from the same area and then tick the options on the right hand side of the screen finished with one click of the green “ok” button. Then the extra stuff has been successfully added on the customer’s orders.

Figure 20

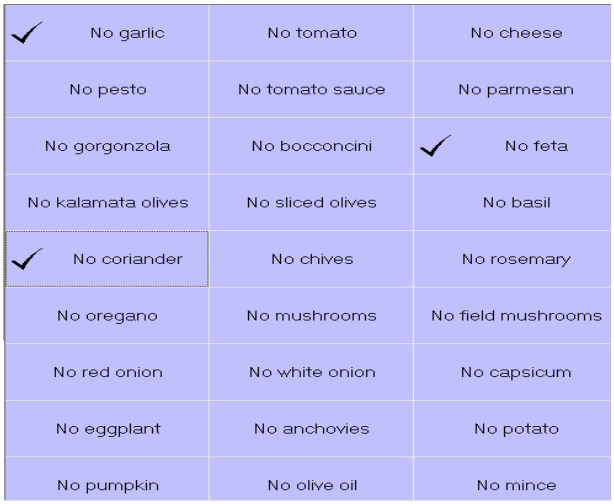


Figure 21

Basic functions and operation skills

For considering the frequently happened matters in a real restaurant, the system provides the operators a bunch of keys and buttons to simplifiers their work to make the workplace efficient and effective. The followings are the most frequent actions you may experience:

3.1.6 Change the quantity

A customer ordered 5 cans of coke. For this circumstance, you do not need to waste your time to click the ‘coke’ button for five times. There are three simple ways to get it done:

Method 1

1. Swap to the ‘Payment Panel’ by one click of the ‘Tender’ button.
2. Press the quantity you want to enter, for this case, we have 5 cans of coke, press the ‘5’ button followed with one click of the ‘*’ button, and then click the coke button. The 5 cans of coke have been listed on the orders window.

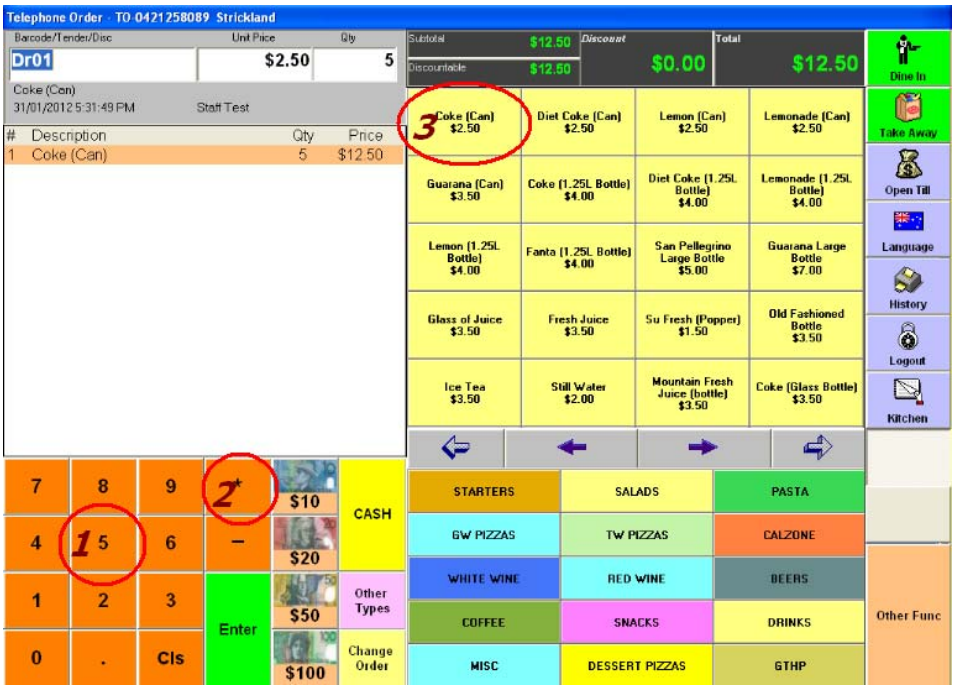


Figure 22

Method 2

1. Click the coke button once.
2. Click the ‘Quantity’ from the ‘function Panel’.

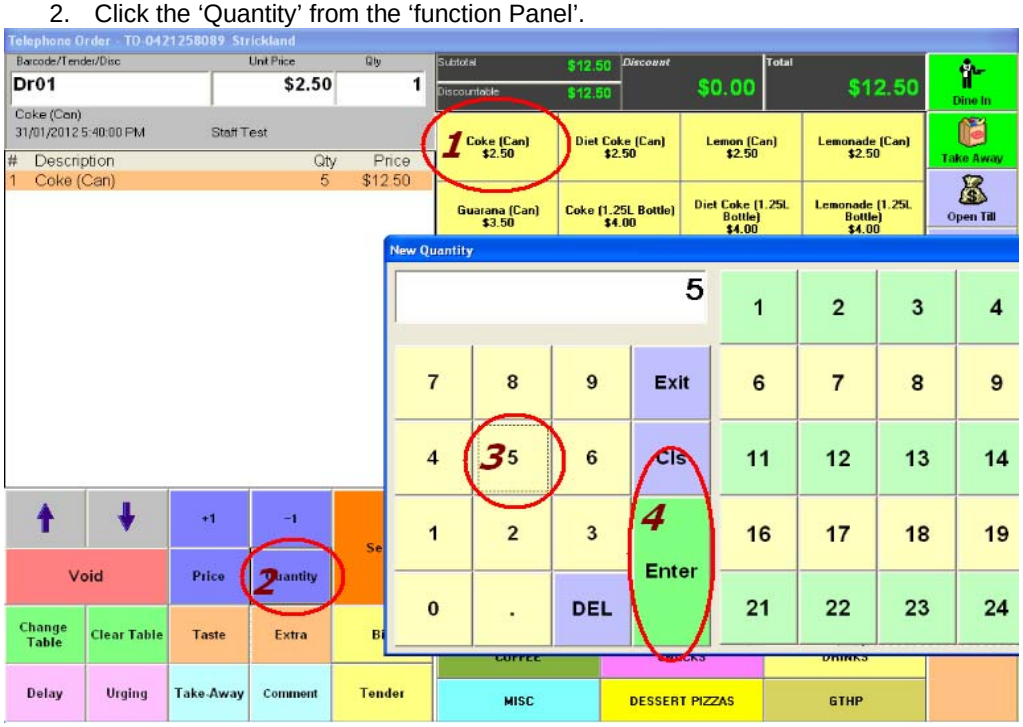


Figure 23

In the coming window, press the ‘5’ button followed with one click of the ‘enter’ button. Now you can see the 5 cans of coke have been shown on the order list window.

Method 3

1. Click the coke button once.
2. Change the quantity by clicking the ‘+1’ or ‘-1’ button to adjust it to 5.

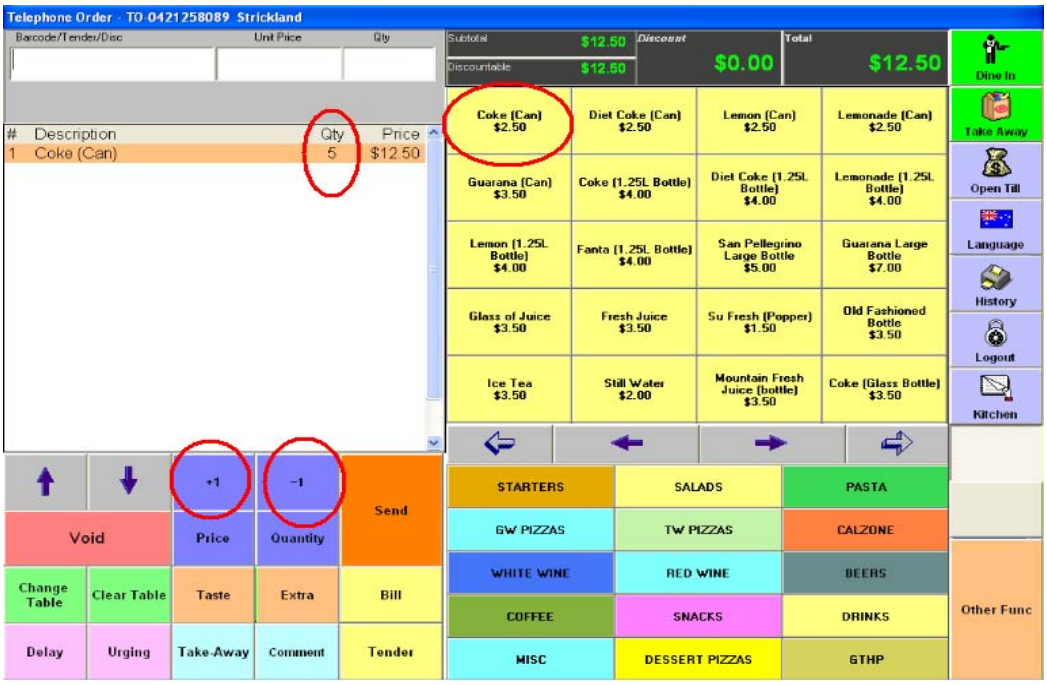


Figure 24

3.1.7 Price/Quantity Modification

How can you change the price and quantity? Select the item in the Sale Panel, and once it is highlighted, a copy appears in the barcode scanning area.
If you wish to change the quantity, click the “Qty” button in Amount / Quantity Control area, or the “Price” button for price modification.

For example, if you will like to change the price of “Peroni” item’s price and the quantity

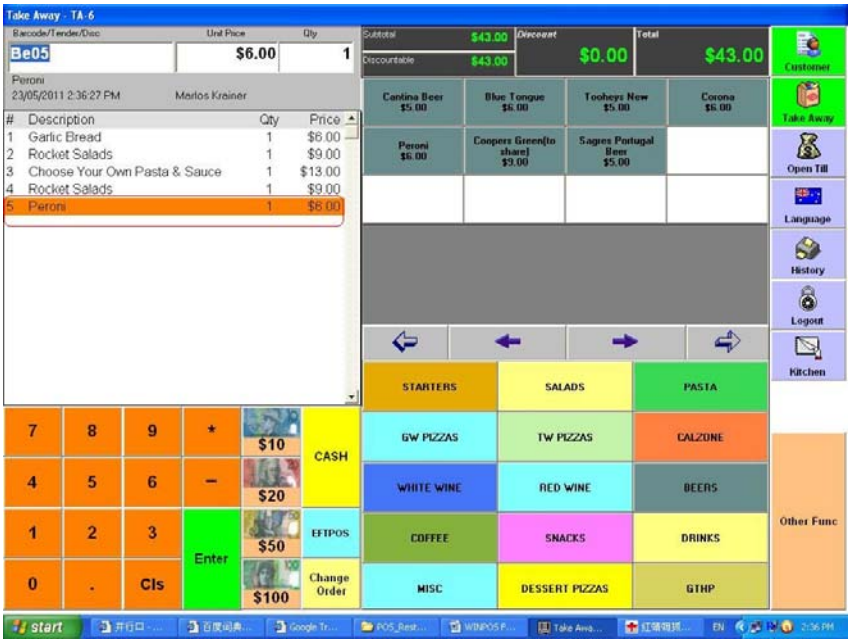


Figure 25

Select the “Peroni” item in the Sale Panel as in the above figure. The item in the Sale Panel will be highlighted, and in the barcode scanning area, there is a copy indicating the price and quantity.

Figure 26

Once you press the **Change Order** button, then press the **price button, and enter the desired price** directly using the popup number keys as the following figure.

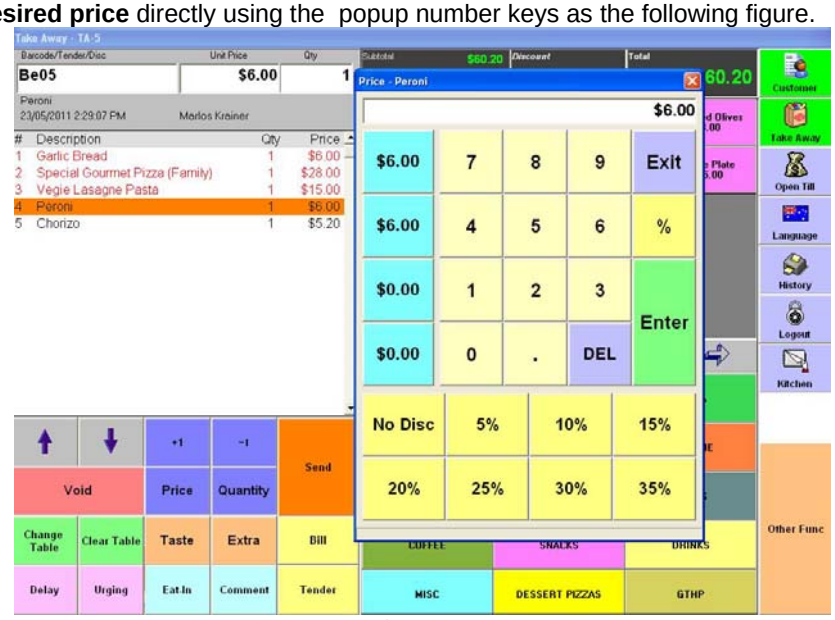


Figure 27

Quantity modification is similar to modifying the price, except for pressing the **Quantity** button rather than **Price** key.

3.1.8 Payment Input

As soon as all items have been input, you are allowed to finalise the payment step.

The standard method of payment input is by entering the payment amount in the **Barcode/Tender/Disc** field and then selecting the payment type as shown in the following figure.

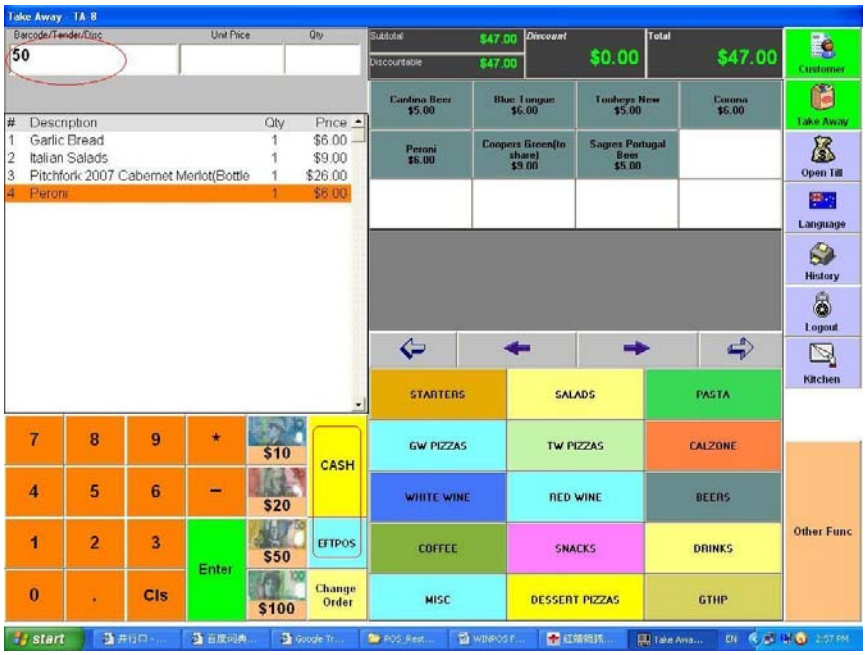


Figure 28

According to Figure 28, the bill is $47.00 and the customer pays $50 cash. Enter 50 in the **Barcode/Tender/Disc** field or press the amount buttons. (Click “$50”). Then click **CASH** button to get the confirm window.

Figure 29

The System asks whether to commit the transaction, with $3.00 change. If yes, simply select **yes** to print a docket, otherwise click **No** to step into the **Other Payments** window.

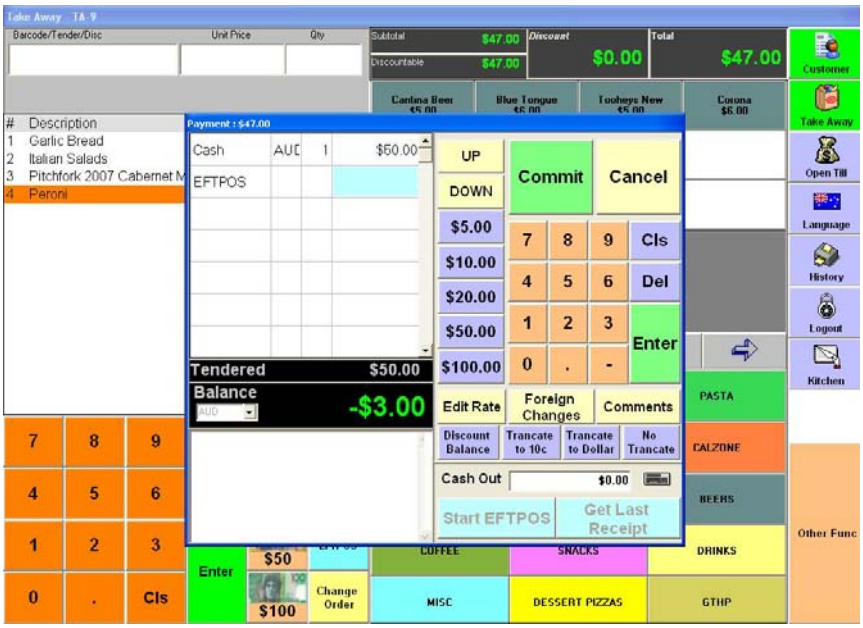


Figure 30

There are four columns in the payment table: payment method, abbreviation of the payment method, foreign exchange rate (base on AUD) and amount.

Payment method(s) can be initialised in section **4.4 Payments**. Normally (Figure 30), the first row is always cash input and you only need to input the amount to continue. if customer wishes to pay AU$20.00 cash and AU$27.00 as EFTPOS, type the amount as shown in the above figure.

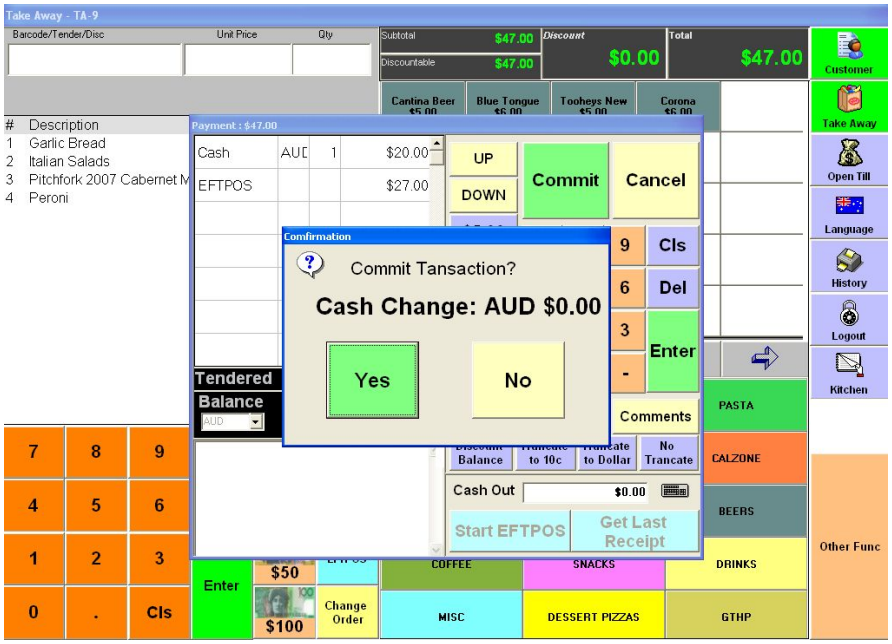


Figure 31

If the payment amount is same as the bill amount, and the customer is paying by cash or EFTPOS, you can simply click the **CASH** button or **EFTPOS** button without entering the amount in the **Barcode/Tender/Disc** field to make the payment.

3.1.9 Finish your transaction

Click Yes in the Confirmation window as shown in the following figure, to open the Docket Summary window.

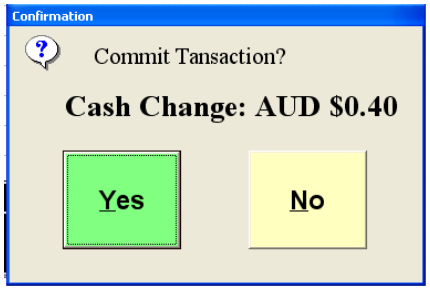


Figure 32

In the **Docket Summary** window, docket will be printed and the till will be opened as well. Finally, select **Close** to start a new sale.

Figure 33

Please be aware that in Figure 33, the small docket will print automatically. If you will like to print the A4 docket, please refer to section **0**

Delete an item

3.1.10 Delete a particular item

1. Customer wants to cancel his 'Choc Fudge Brownie'. So what you need to do is just one click of that item to highlight it.
2. Press the 'Void" button once from 'function Panel' and then that item has been completely removed.

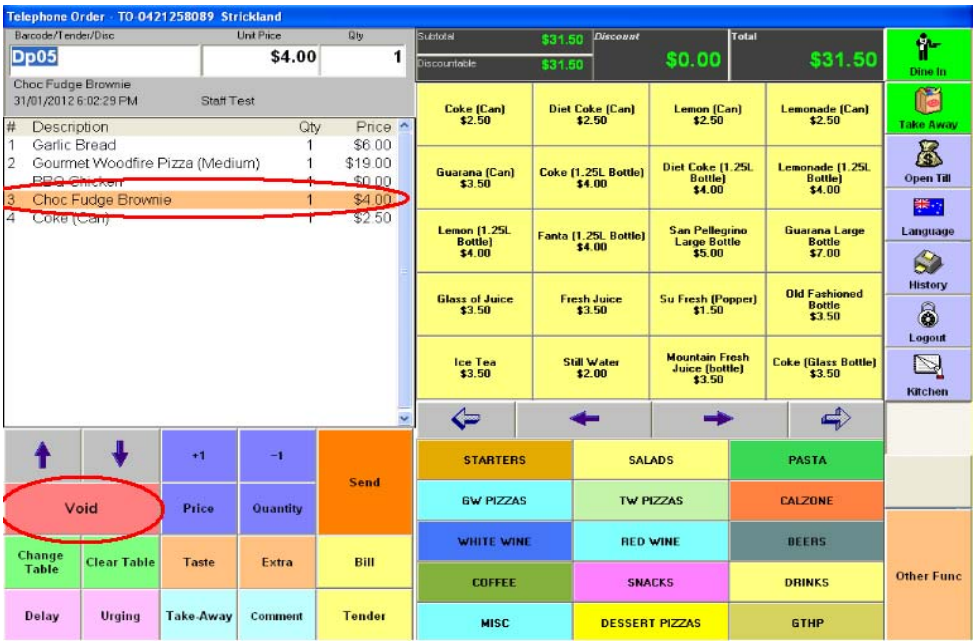


Figure 34

3.1.11 Clear the entire order

1. Get into that order no matter what it is. (Dining in, Taking away)
2. Click the 'Clear Table' button once.
3. In the coming window, click 'yes' to confirm. Then that order has been removed from system.

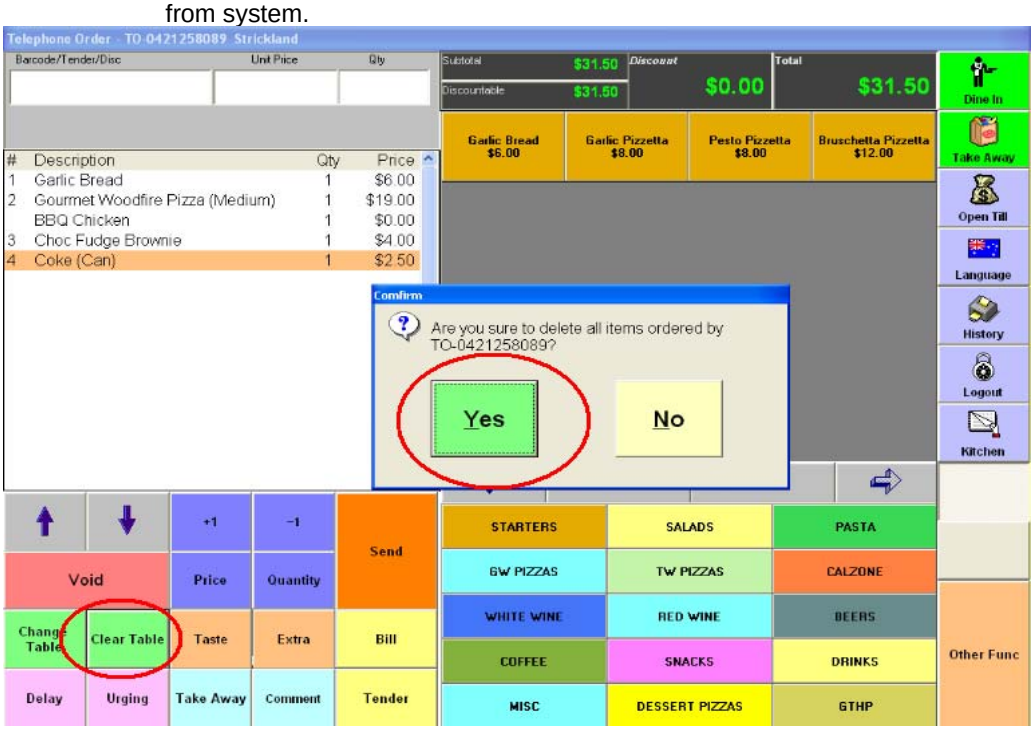


Figure 35

3.1.12 Membership card

Customers can hold membership cards to get points on a sale. The sale would change into points and put into the membership account. They can claim it later to buy other products.

There are 2 ways to a membership card in a sale, you need to do it on the sale window, before payment, or before sale.

- Select a patient.

Click on the button “Customer” (

) at the top-right corner, then click on “Browse”, or enter conditions to search, then click on the line, and at last click on “Select” button.

- Scan or enter a membership card number (Usually starts with “M”).

After the above you have selected the customer. The points gained would be displayed on the bottom bar of the window.

You can also go to Sale window \ Customer, then browse and select a customer. On the “Sales” tab of the customer information, you can view the points and value.

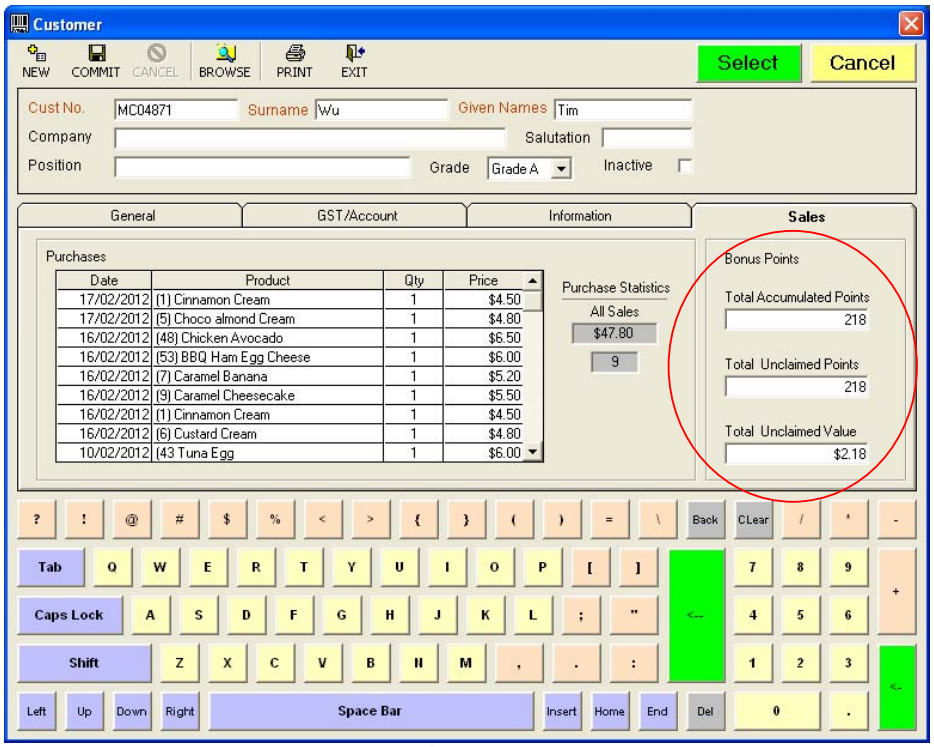


Figure 36

To change the points getting from sales, and the value of the points, see section 4.6 .

To claim the points, before you make a payment in a sales, enter “-“ and scan the membership card, and the value of the points will be deducted from the sale.

Figure 37

If free bonus is set, when “Claim when quantity >” is set to 6, the customer can get his sixth product for free.

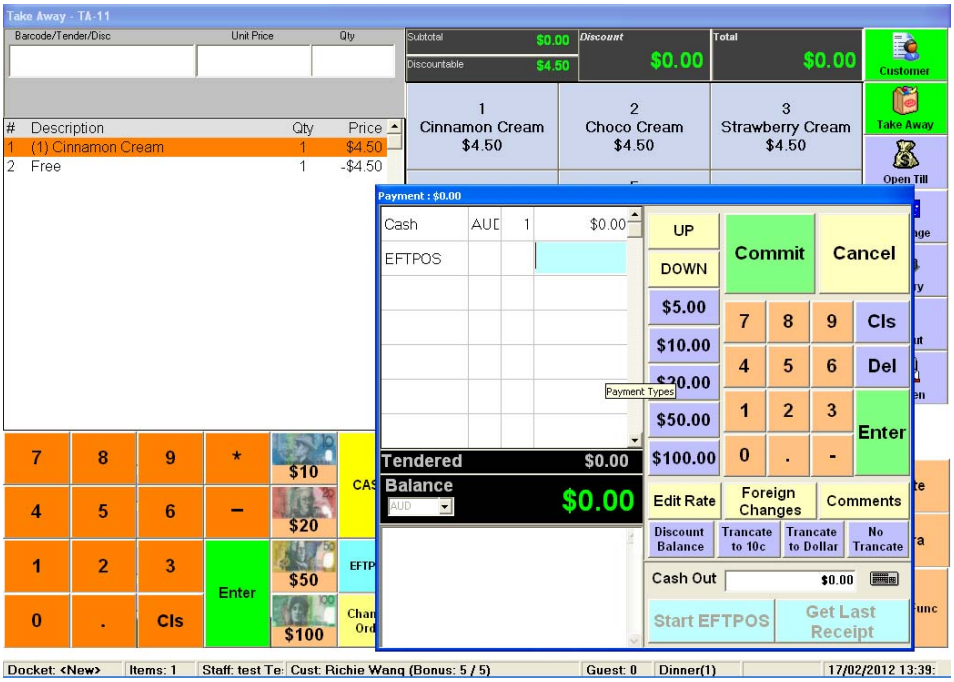


Figure 38

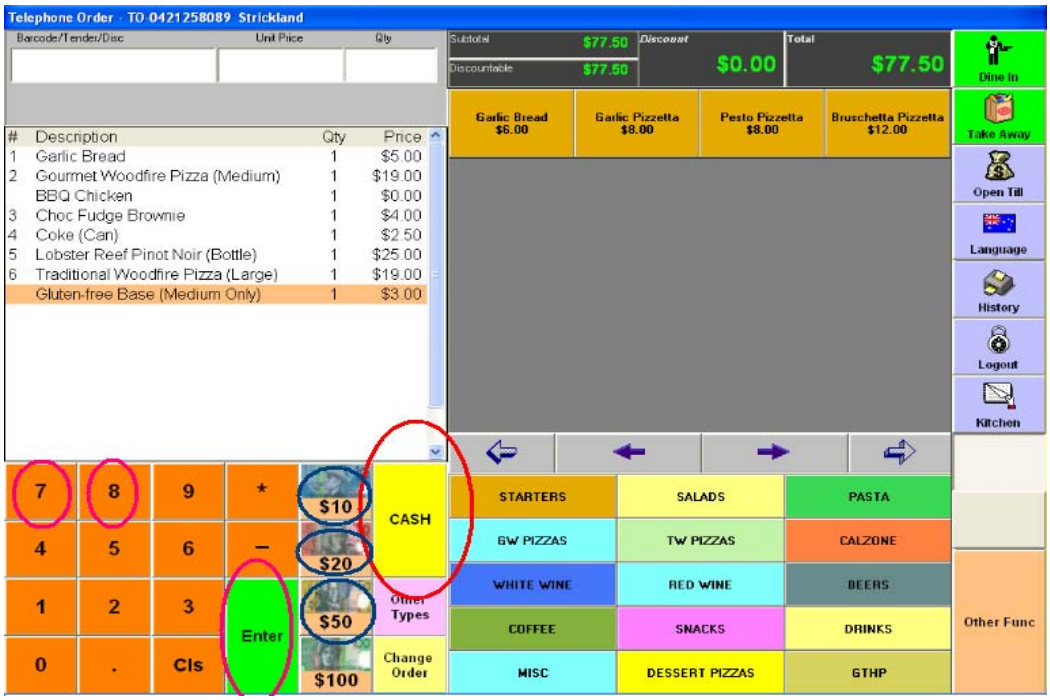
3.2 Payment

POS Expert gives you flexible payment options to fit your business requirements. It accepts kinds of payment methods that generally include cash, credit card and Eftpos.

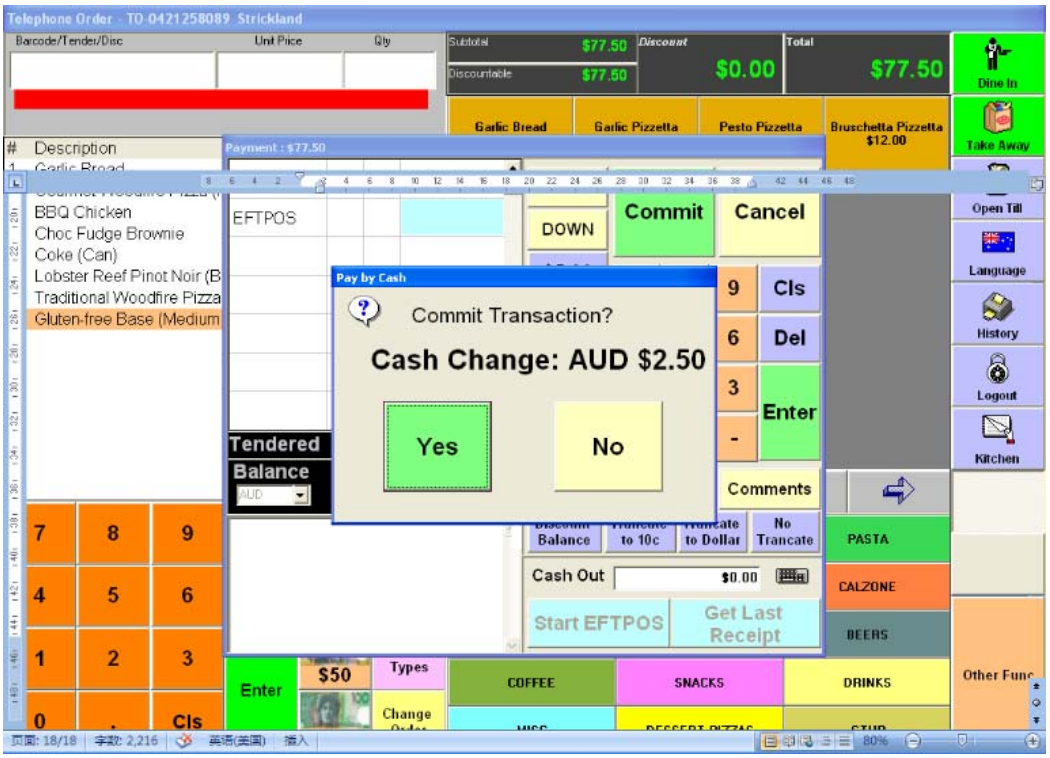
All you need to do is to use the different buttons on the 'payment pad' to finish the transaction.

3.2.1 Cash Payment

For that order, the bill is $77.5. If customer gives you the exact amount of that bill, click the 'Cash' button once only; If customer gives you one $50, one $20 and one $10 notes as well as 'Cash' button, press those four buttons once; If customer gives you $78, simply click '7', '8' and 'Cash' button.



2. Meanwhile, the cash draw will be opened up to and then you need to confirm the payment by clicking the 'yes' button in the coming window. Obviously, from that window, you also can identify how much change you need to give to the customers.



3.2.2 Card Payment

If customer wants to pay for the bill by card, press the ‘Other Types’ button from the payment pad. In the next coming window, choose which kind of payment method you are applying, finish with one click of the ‘Commit’ button.

3.2.3 Mixed Payment

In that order, if customer would like to pay $30 in cash and $47.5 in EFTPOS. You still need to choose ‘Other Types’ from the payment pad. In the coming window, input the cash amount of $30 in the cash table by using the pin pad and $47.5 in the EFTPOS table.
Click the ‘commit’ button followed by one click of the “yes’ button to finish the transaction.

3.3 Advance POS Expert Front Operation

You are a junior **POS Expert Front** operator and you are able to finish a standard **POS Expert Front** implementation now! However, not all the transactions are as simple as the examples above. How will you apply a discount to the item? How will you handle an

incorrect item input? In the following section, we will introduce more advanced operations to make you a professional!

3.3.1 Discount Setting

In POS Expert system, the “discount” setting is applied for one transaction only. In other words, when you set a discount for the current transaction, it will be returned to “No Discount” after the transaction is completed. There are four ways to apply the discount:

(1) Use the price window .

Figure 39

Discounts are available in three types: The % shortcut uses percentage based discounts, the direct value input applies a “dollar-off” type of discount and “Rounding” is “$XX.X0” or “$XX.00”.

For example, if an item were selling at $27.60, If you will like to apply 5% off, input “5%” to get $26.20.

(2) Set the customer grade for discount (Please refer to section **8.5** in **POS Expert Back Office** for more detail)

(3) Set the discount/customer card (Please refer to section **2.8** and **2.9** in **POS Expert Back Office** for more detail)

(4) Set the Docket Discount / Discount Code in the option page:
Click **Other Func** to open the **Other Functions** window as shown in Figure 40, then apply the **Options** buttons to open the **Options** window. Select the **Payments** page, you will find **Docket Discount** and **Disc Code** for discount setting (Figure 41).

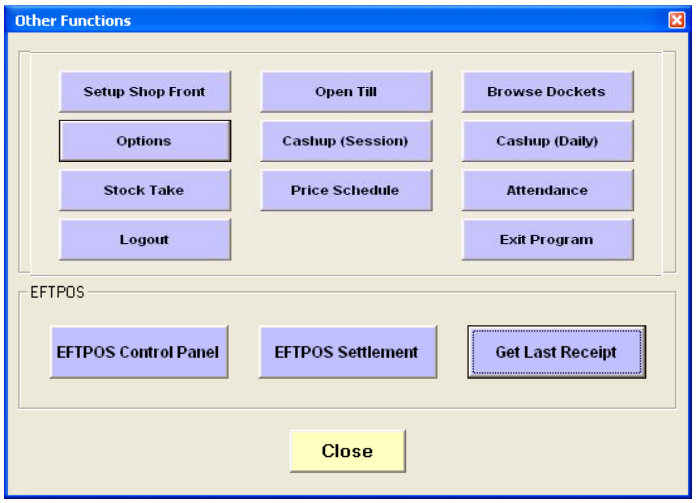


Figure 40

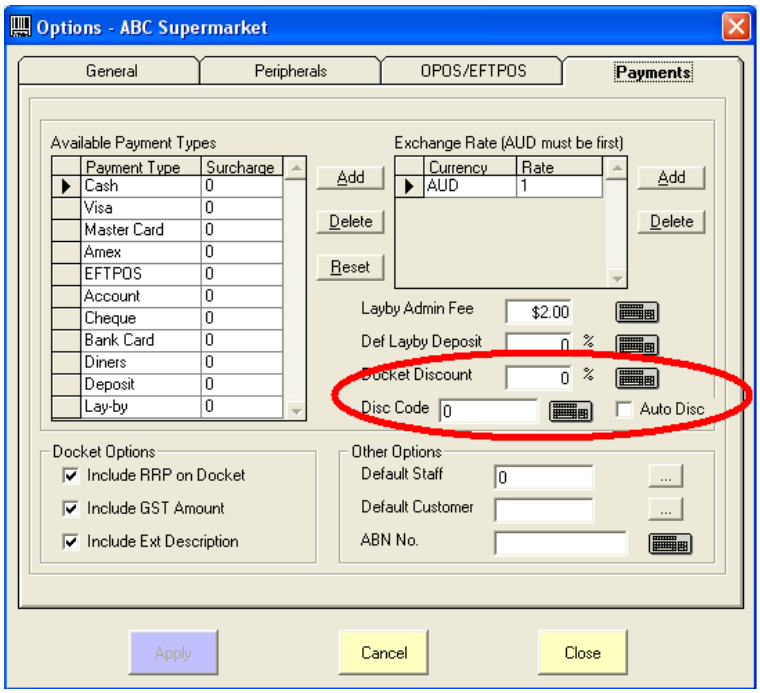


Figure 41

For example, if your shop is running a promotion, and all products are 10% off, it is easy to adjust the discount by **Docket Discount** value. Just type 10 in the **Docket Discount field** and check the **Auto Discount** .

If you will like to produce a special code (the code is only applied to the **Barcode/Tender/Disc** field of the Main Window) for discount, type the value in both the **Disc Code** and **Docket Discount field**. (the Auto Discount Option should be unchecked)

For example, suppose the **Docket Discount** is “18” while the **Disc Code** is “181818”. Type“181818” plus the Enter key in the **Barcode/Tender/Disc field (see below)** and “18% off” will be displayed on the discount button (Figure 43).

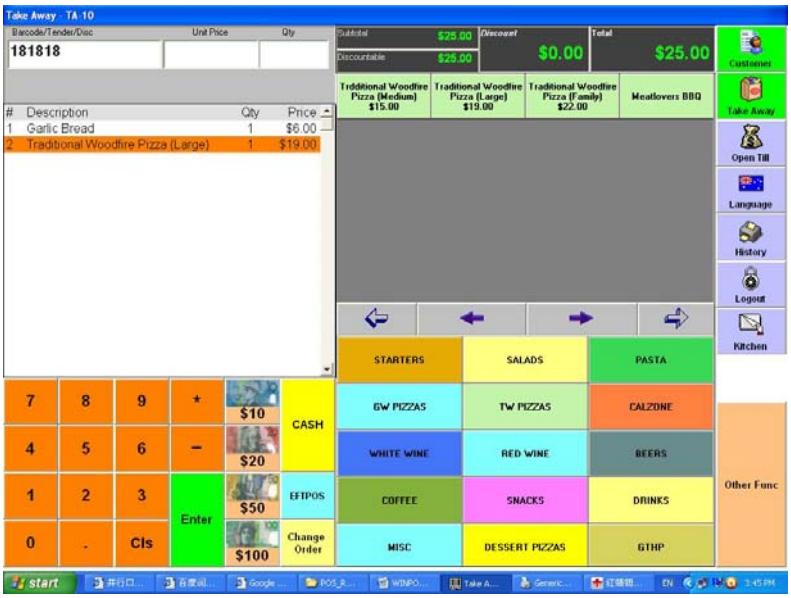


Figure 42

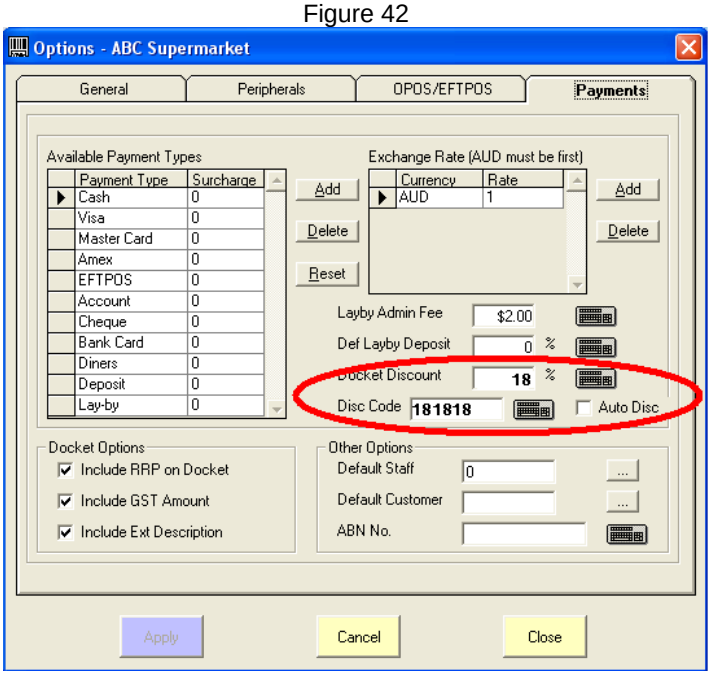


Figure 43

Disc Code can be printed as a barcode label in POS Expert Back Office, such that whenever you scan the barcode label, the system will smartly change the discount to the value you pre – defined.

3.3.2 Binding a Customer to the Sale

To attach a specific customer to a sale, click **Other Func** then **Customer** to get the **Customer** window. Apply the **Select** button to attach the customer highlighted to your current transaction and the window will close automatically.

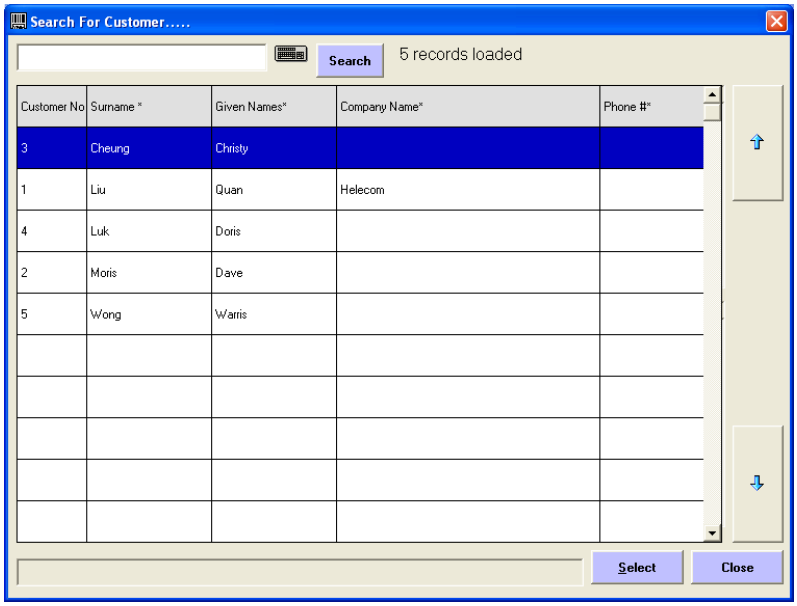


Figure 44

3.3.3 Void Item

You may need delete item during POS Expert Front operation. Click the item you want to delete to make it highlight, then click Change order button, you will see void button , click it ,you will delete the item from the list

Figure 45

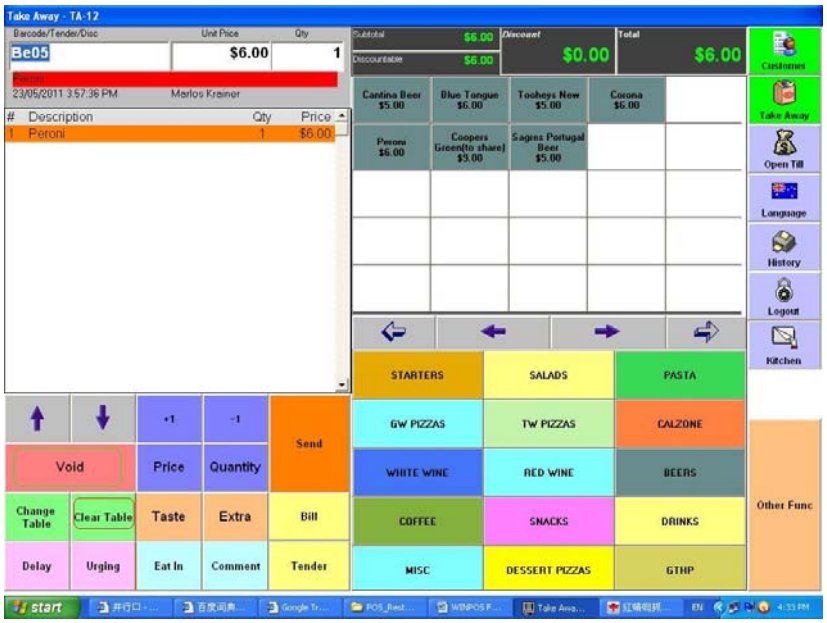


Figure 46

If you want to clear all items of this transaction, click “clear table” button, see the above figure.

3.3.4 Refund

There are several situations where a refund transaction is necessary, each differs slightly in process. This is, of course, assuming that the refund is valid and authorized – the following section describes how to perform refund transactions in **POS Expert Front**.

The two main methods of entering a refund into the system are as a newly scanned transaction or by reloading an old sale.

(1) Newly scanned transaction: This is similar to the standard **POS Expert Front** sale, except the quantity input requires a “minus” value. For example, in the following figure, modify the **Qty** then press **Enter** to reverse the quantity.

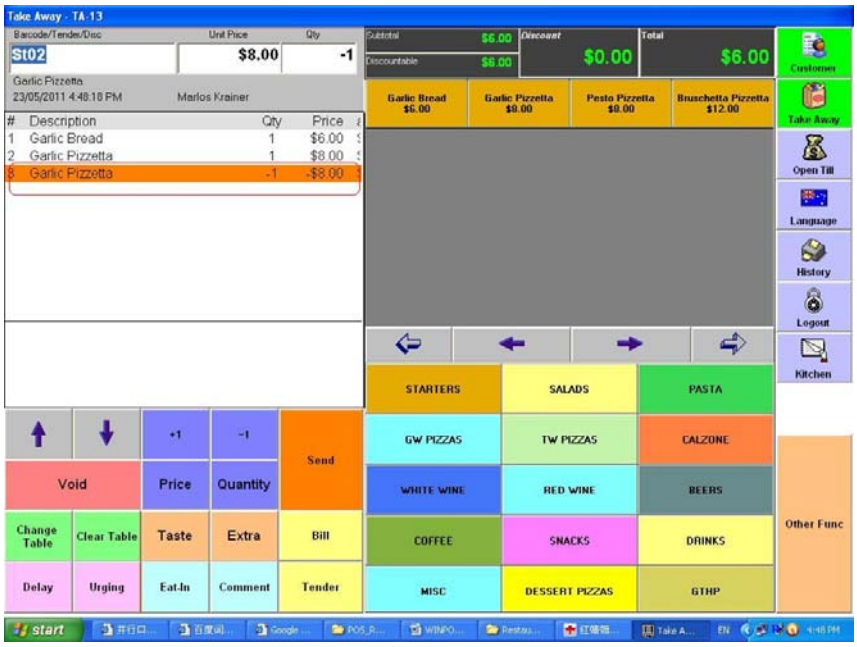


Figure 47

(2) Reloading an old sale: You can reload the previous sale details using the **History** button. The window in the following figure is the browsing window helping you to choose the specific sale. Once you find your sale, apply the **Select** key and all data will be transferred to the **POS Expert Front** Sell table. You can simply press the **Refund** button to reverse the quantity or void the non - refund record(s) and reverse the dedicated item(s) in turn (Figure 49).

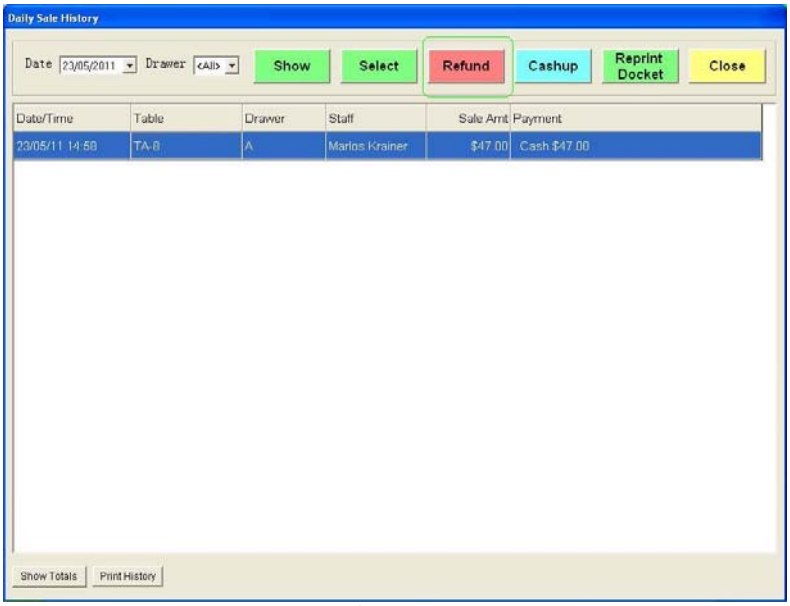


Figure 48

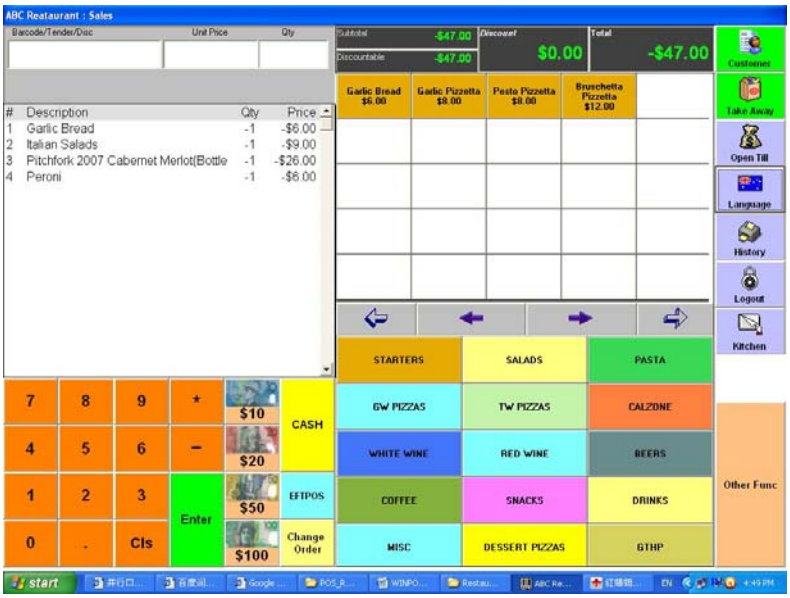


Figure 49

If a new sale exists whose content (item list) is the same or similar to a previous one, a short-cut can be used: Reload the old sale first, and then apply the **Refund** button twice!

3.3.5 Cash In/Out

If it is necessary to record any cash procedures without a sale transaction, Cash In/Out is the best way to process. Try to click the **Cash In/Out** button to activate a cash operation window as **Error! Reference source not found.**.

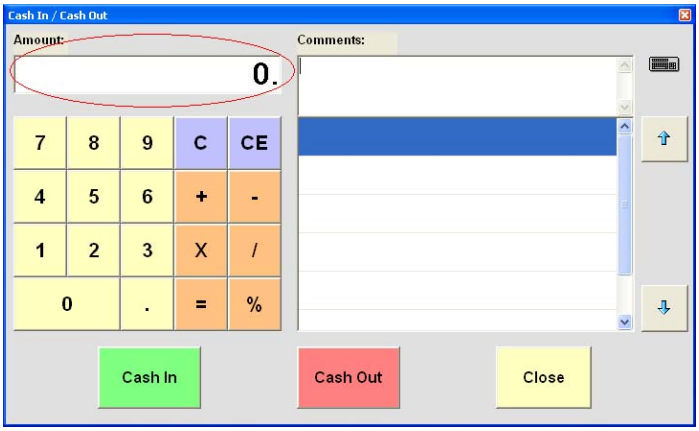


Figure 50

Type the amount in the **Amount** text box, add comments (optional) then simply click the **Cash In** or **Cash Out** button depending on your circumstances. (Comments are defined in the **Cash In/Out** Module of POS Expert Back Office, please refer to section **8.4** in **POS Expert Back Office**)

3.3.6 Cash Up

The Cash Up function allows you “Reset” your drawer’s cash status, helping you check your transaction result compared with the drawer status in reality. In **POS Expert Front**, there are two types of Cash Up: by Session or By Daily.

It is obviously that the two methods are different from the period calculation. The start date of Cash Up by Session is the last ending date of Cash Up by Session. In other words, there is no limit to the Date and Time for cash up, and the period is not separated by date logically. However, Cash Up By Daily is critically dependent on the “Date”.

To run the Cash Up, click the **Other Func** button then select the **Cashup (Session)** or **Cashup (Daily)** key. The Cash Up by Session message window is shown below. The user will need to enter the details of the drawer summary.

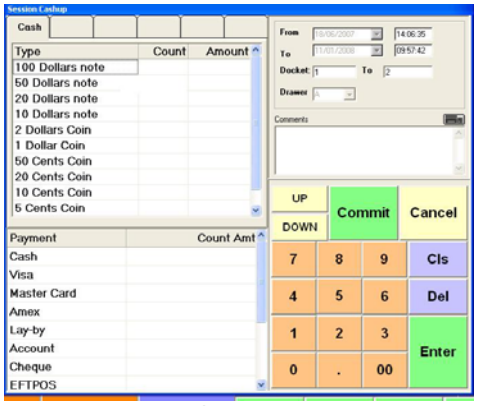


Figure 51

The Cash Up By Daily message window is shown in as below.

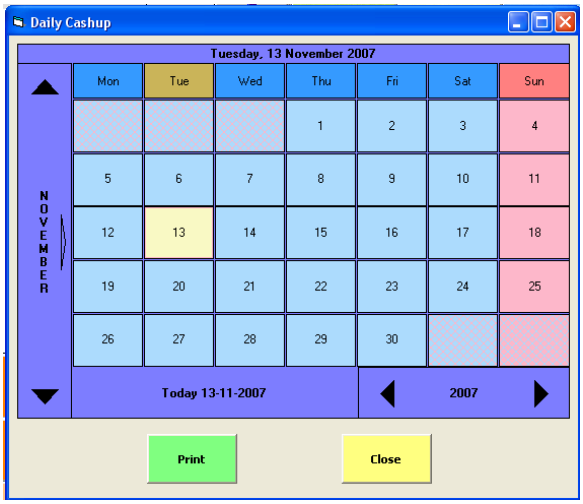


Figure 52

3.3.7 EFTPOS Device

POS Expert Front supports two types of EFTPOS devices: **Ingenico PC EFTPOS** and **Quest EftposPlus**. To use the EFTPOS device, you must set up the EFTPOS device software (Please refer to section **2.2.1 EFTPOS Device**) and enable the EFTPOS in **POS Expert Front**. (Please refer to the section **4.3 OPOS / EFTPOS**)

If you are at the stage of starting to make a payment like in the following figure, press the EFTPOS button to open the EFTPOS status window as shown in Figure 54.

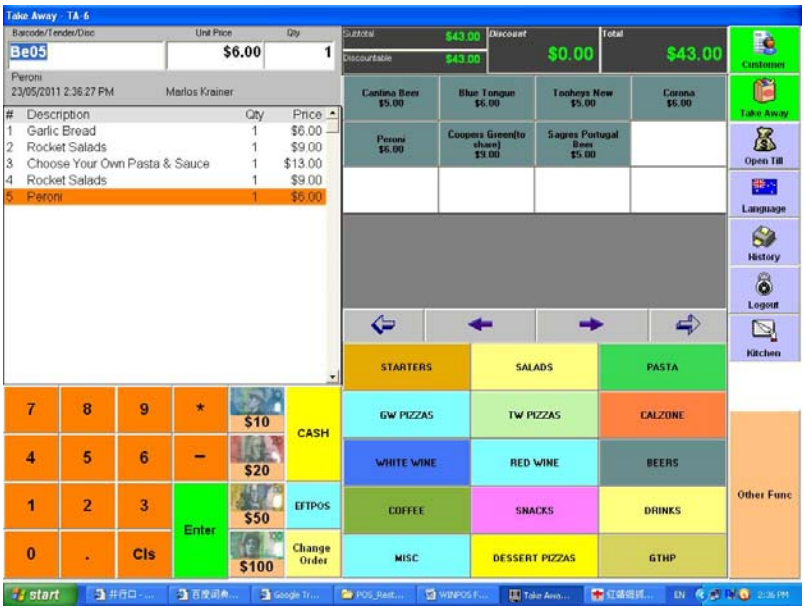


Figure 53

Figure 54

On the side of your EFTPOS device, as soon as you swipe the card, select the account and enter the pin number in order, the EFTPOS status window will be displayed as **Error! Reference source not found.** if the account input is correct.

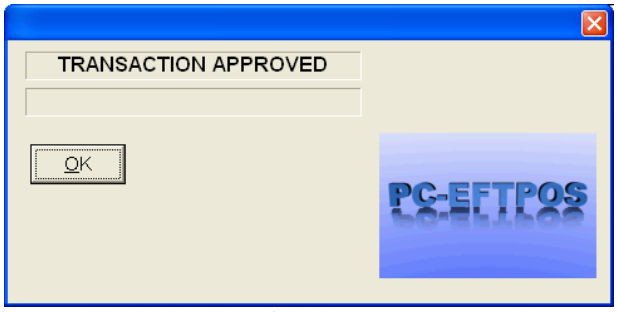


Figure 55

In the above figure, the transaction of EFTPOS transaction is approved. If the pin number combined with the account type is incorrect, the transaction will be declined. At the same time, no matter what the transaction result is, docket printer will print the EFTPOS transaction record.

Finally, if the EFTPOS transaction is approved, confirm and finish the transaction as usual and create a new sale in sequence.

If you are at the stage of starting to make a payment, press **Other Payments** to open the Other Payment status window. Select the correct type of payment and press on Commit to proceed with the transaction. You will be able to place a surcharge for using a credit card.

3.3.8 Sale Record

Normally, the Sale Record and Sale Summary are shown in POS Expert Back Office. In **POS Expert Front**, it is also a possible to check the Sale Record for convenience.

(1) If you are going to browse a sale record, use the **History** button to open the **Search For Sales** window.

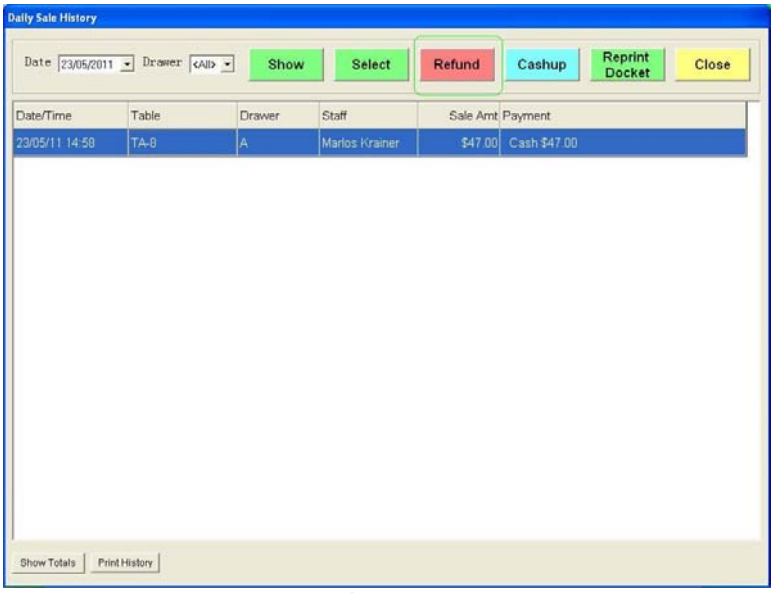


Figure 56

(2) Another way to browse the sale record is by reviewing the docket. Dockets are permanently backed up as photographical type on your hard disk. (Unless your computer is out of space to store the graphics or you do not check the **Backup Docket to File** in **Options** setting). Click **Other Func** then the **Browse Dockets** button.The following window will open for docket review.

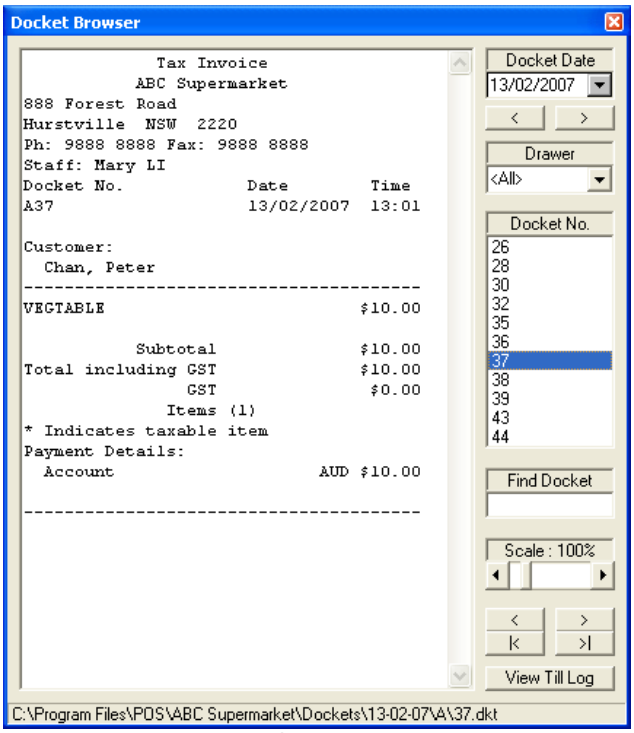


Figure 57

3.3.9 Price Level

You can schedule price change of certain products at a specific time. To setup the schedule, click the **Other Func** button then select **the Price level** (Figure 58) Here,

Figure 58

3.3.10 Attendance

With the attendance function, staff can Check In/Check Out of the cash drawer. This will create a log in the POS Back Office so you will be able to see which staff were working on a particular cash drawer during that time. Before the staff begin work, they check in by pressing the **Other Func** key, then the **Attendance** key.
Staff put in their password and press **Check In** key, then **Yes** key to login. After work, do the same to check out.

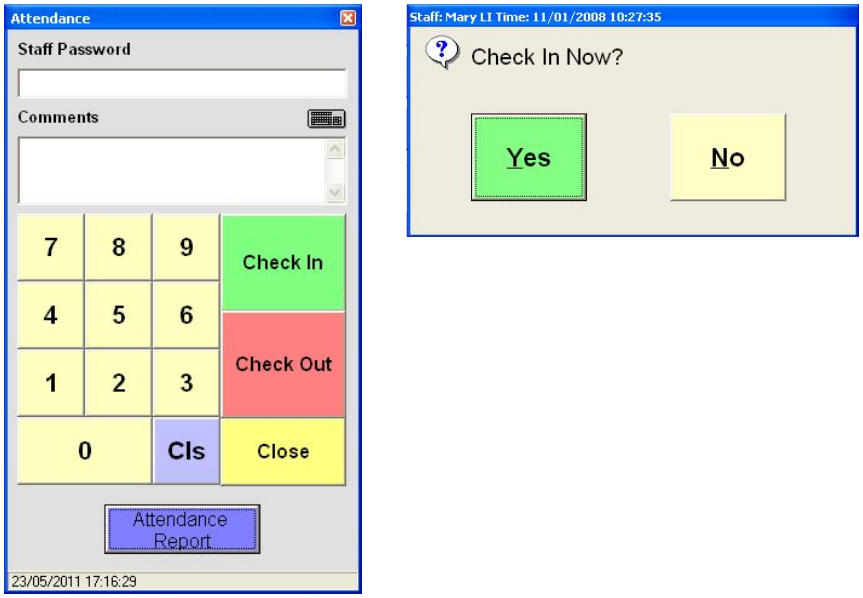


Figure 59

3.3.11 Other modules POS Expert Front

In **POS Expert Front**, besides the functions mentioned above, some other modules are also useful for your POS operation. For example, you are allowed to change the staff (user) without restarting the program, or print the last transaction's receipt with only one click!

(1) Open Till
If you do not check **Don't Open Till** in the **Options** window, you can open the till (drawer) by clicking **Other Func** then the **Open Till** button.

(2) Logout
Press the **Logout** button in **the Other Functions** window to log off from a current staff member(user). A login window will pop up, allowing you re-login with a different staff member(user).

(3) Exit Program
Close **POS Expert Front**.

4 Options

POS Expert Front provides user-friendly modification options, allowing much easier front control. In the Main Window, click **Other Func** then **Option**, and you will be guided to an option panel. It is divided into four categories: **General**, **Peripherals**, **OPOS/EFTPOS** and **Payment**. In this section we will introduce these four categories in detail.

4.1 General

4.1.1 Overview

As shown in the following figure, the **General** page is composed of three parts: **General Options**, **Skip Fields** and **Rounding**.

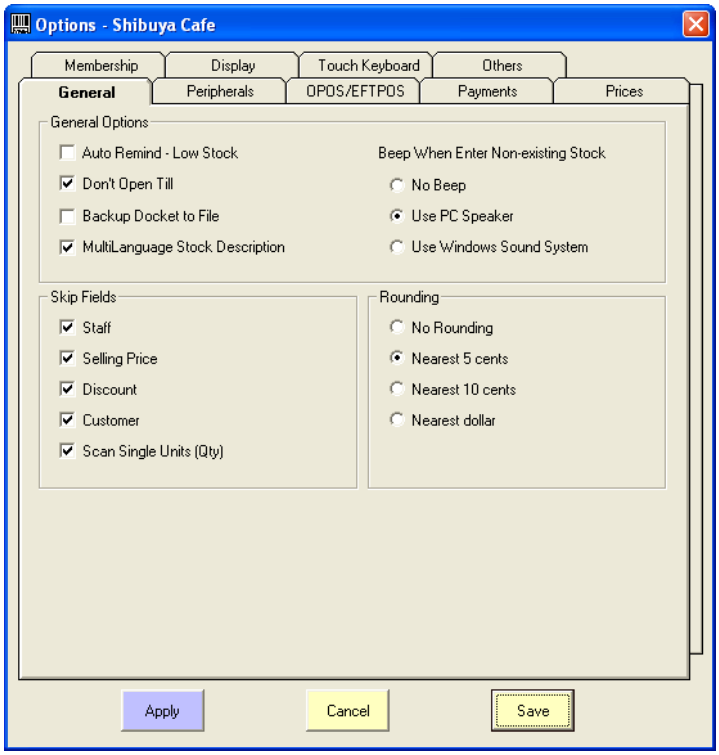


Figure 60

4.1.2 Field Definition

General Options

Auto Remind – Low Stock: Remind the user if the stock is lower than the limit. Be aware that the limit is set in the **POS Expert Back Office**.
Don't open till: Till (Drawer)cannot be opened if this box is checked.
Back up docket to file: The invoices will be stored in PDF file into your designated path automatically.
Multilanguage Stock Description: The item description will be printed out in both languages in the dockets.
Beep When Enter Non-existing Stock: Set the Beeping type for when an item cannot be found.
Skip Fields: < to be filled in >
Rounding: Depends on the business' requirements, you can choose from 'No rounding', 'Nearest 5 cents', 'Nearest 10 cents' or 'Nearest dollar'.

Opening Till Need Password: This option is temporarily not available.
Backup Docket to File: It is suggested to check this option so that the system could stores the docket as a graphical files. It is a copy of your docket printed out from your docket printer.

4.2 Periperals

4.2.1 Overview

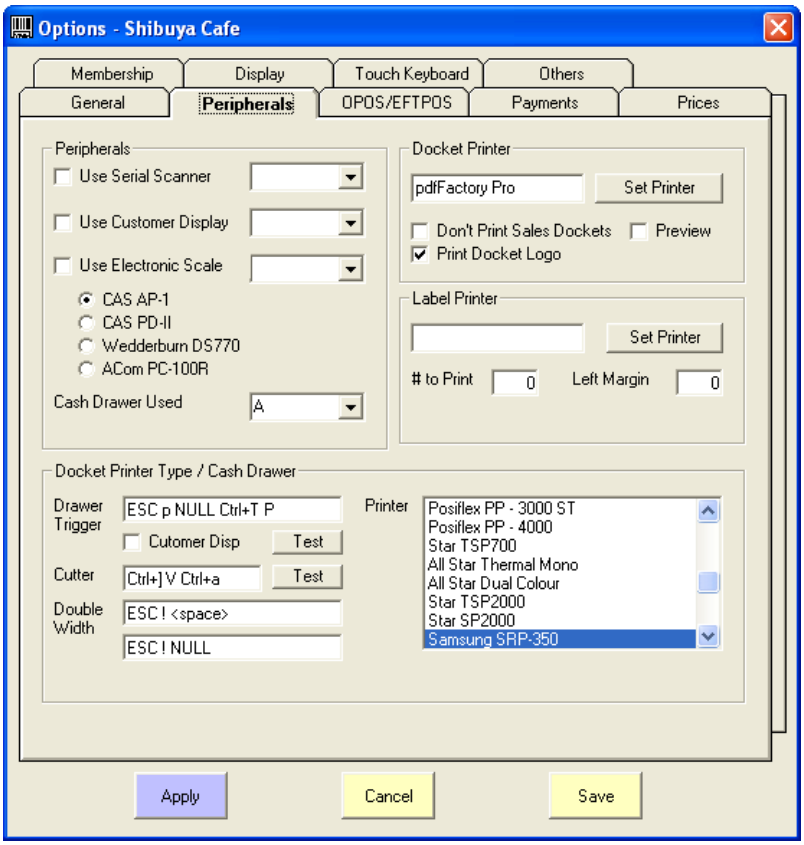


Figure 61

As in the above figure, the Peripherals option allows you initialise the docket printer, customer display, electronic scale and cash drawer.

4.2.2 Field Definition

(1) Peripherals

Use Serial Scanner: the scanner is serial port instead of USB port. Choose the serial port.

Use Customer Display: To enable the customer display, you need to tick the box in front of the 'Customer Display'. In addition, the selected com port must be exactly same with the com port where you plug the customer display data cable in.

Use Electronic Scale: Same settings as the customer display. Also, you already have some options to choose from the list underneath.

Cash Drawer Used: It is significantly important for the premises where there is more than one cash register. You must distinguish the cash draw in different letters from here. Duplicated cash draws may lead misleading sales reports.

(2) Docket Printer

Set Printer: Set the docket printer module in the Printer window.

Don't Print Sales Dockets: Checked if you are not required to print docket or you do not use the docket printer at all.

Preview: If unchecked, docket will be printed automatically at the end of each transaction. Otherwise, you press apply **Print Docket** button in Figure 33 for printing.

Print Docket Logo: Logo is printed on the docket if checked.

(3) Label Printer

There are maximum two label printers which could be set for you to print every single item in label format. The configuration method is the same as the settings of

the docket printer. However, as soon as you finish your label printed setting s here, you still need to edit its configuration in your POS.ini file to assign print task for one printer or one of each. Please refer POS.ini file explanation for details.

(4) Docket Printer Type / Cash Drawer
Some control commands are sent directly to the printer. Please refer to the command code manuals for the printer you are using.
Drawer Trigger: The drawer is connected to the printer, and this command will open the drawer.
Customer Displ: This command will send text to the LED display that connects to the printer
Cutter: This command will cut the paper fully or partially
Double Width: The upper one is the command to start double width. The lower one is the command the end double width.
Printer: This is the profile number associated with Peripherals.ini file. The docket name is [Docket Printer <number>]. See also the Peripherals.ini comments.

(5) We recommend you set up the other fields in Peripherals Options as default. The option values depend on the hardware connection and the printer/drawer/scale/customer display driver.

4.3 OPOS / EFTPOS

This Option page allows you set up the OPOS / EFTPOS driver and the Touch Screen Keyboard.

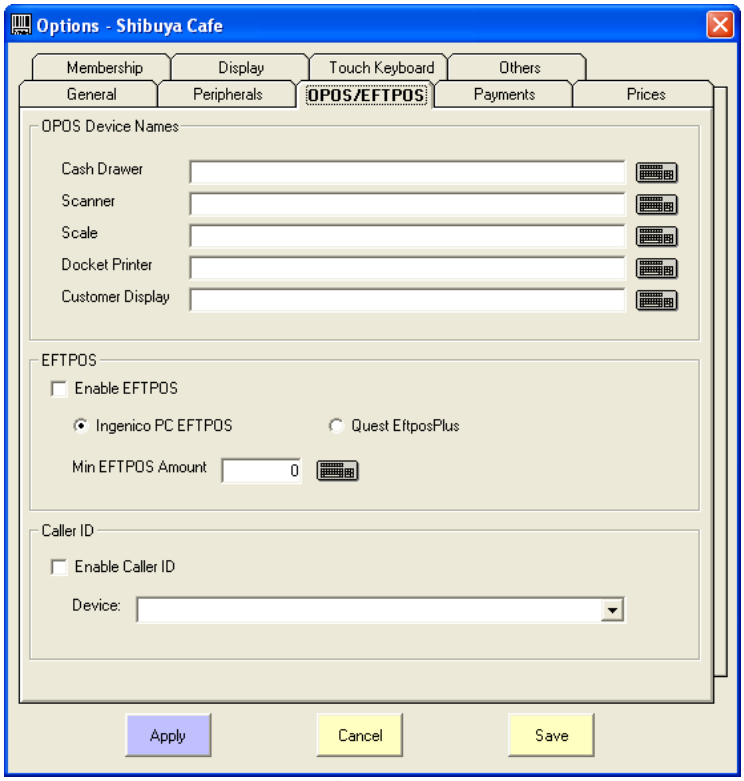


Figure 62

You can set up your OPOS devices to connect with the systems by simply putting the devices' names into each text box.

4.4 Payments

4.4.1 Overview

Payment Option allows you initialise the payment methods and the exchange rate for foreign currency respectively.

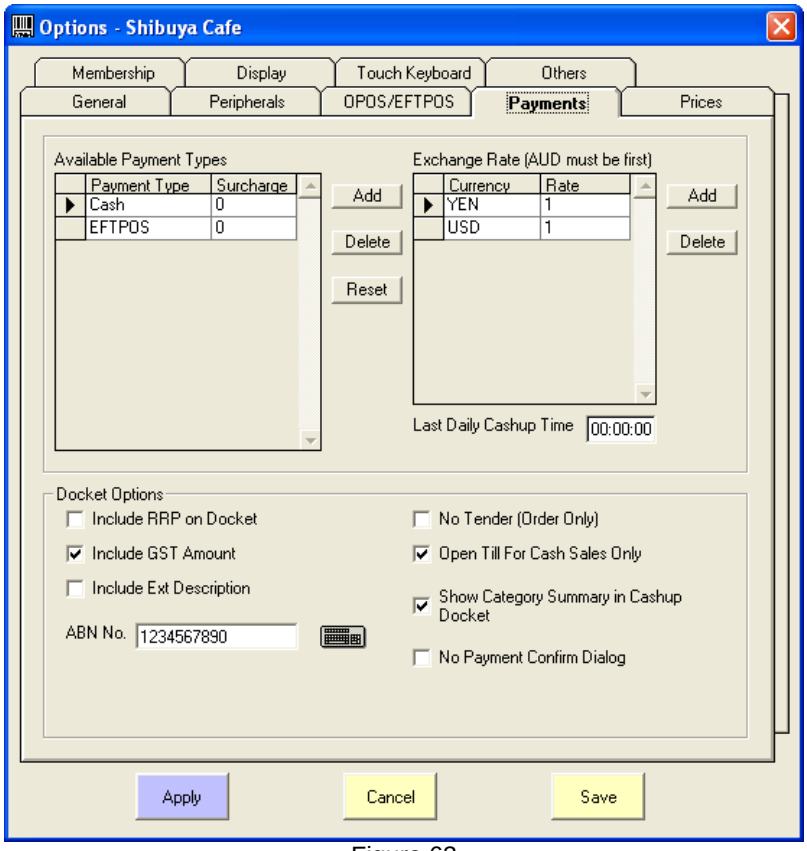


Figure 63

4.4.2 Field Definition

(1) **Available Payment Types**: Different payment methods can be input using the **Add** button on the right of the table. Some Payment types are fixed such as Cash and Account due to special requirements in the transaction.

- To add a new payment type, click the 'Add' button once, put the name into the 'Payment type' finish with one click of the 'Enter'. The surcharge is also available to be edited. For instance, the surcharge for 'American Express' card user is 10% of the whole amount of the bill, so we put 10 into the surcharge field of the 'AMEX'.

- To delete a particular payment type, highlight that one and then click the 'delete' button once.

- If you click the 'Reset' button, all the initial payment types will be listed into the payment type field.

Exchange Rate: This system supports multi currency as part of the payment methods. The settings are pretty much the same as what you do for the payment type. However, you must put the AUD at the first as the default currency.

Last Daily Cash up Time: For some restaurants, the closing time may vary from the calendar day so that you need to define your business daily cash up time from here.

(2) **Docket Options**: If checked, RRP / GST / Extended Description will be printed on docket as well.

Include RRP on docket: The Recommended Retail Price (RRP) for each item will be shown on the docket. For example, if you give customer a 1dollar off discount on a bottle of coke, the original price $3.5 and the after discount price $2.5 both will be presented on the docket.

Include GST Amount: The sale price and GST charge both will be shown on the docket.

Include Ext Description: The extended item description will be shown on the docket.

ABN No.: You can input your ABN (Australia Business Number) here and it can be printed on the docket.

No Tender (Order Only): If you have more than one POS terminal at your premise and you only want one or two terminals doing the transactions, tick this option to disable the payment function for those which only can take orders from customers.

Open Till For Cash Sales Only: The cash draw will not open unless otherwise you are preceding the cash transactions.

Show Category Summary in Cash up Docket: In your cash up docket, the category summary will be shown if you enable this option.

No payment Confirm Dialog: For some fast food restaurants or cafes, they want to finish each transaction in a very short time during the rush hours. Tick this option to avoid the payment confirmation window coming up.

4.5 Prices

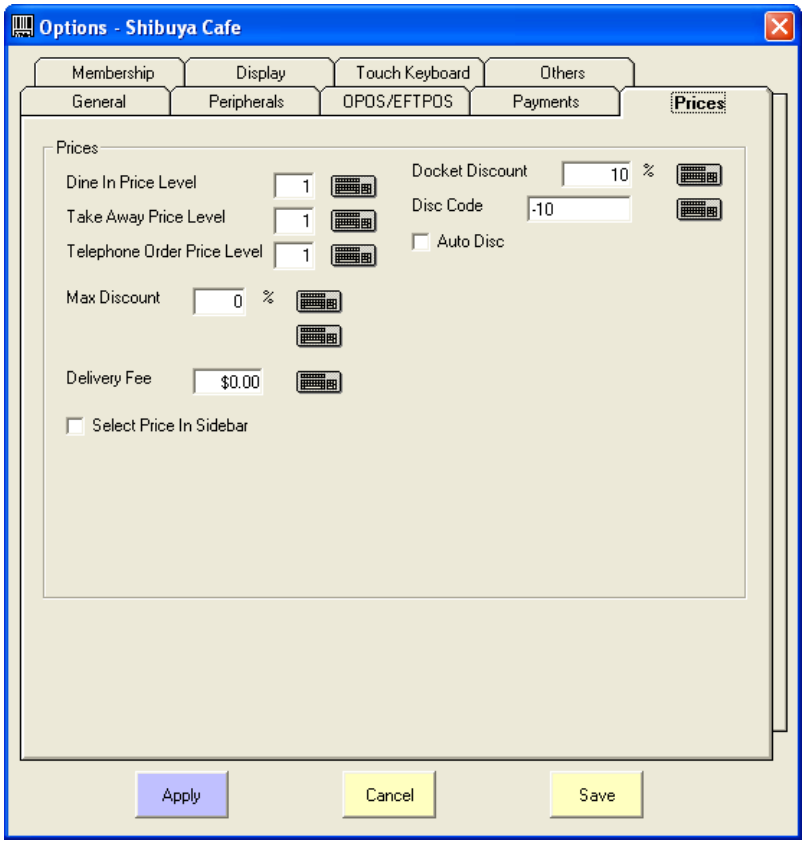


Figure 64

It is common that the prices are different between dining in and taking away. POS Expert provides four levels of prices for every single item. For setting the price levels, please refer the POSBACK manuals for details.
Dine In Price Level/Take Away Price Level/Telephone Order Price Level: You can choose same or different price levels from level1, 2, 3 or 4 for those three options.
Docket Discount: You can set a particular discount for every single docket like 10% off of the docket amount when your shop is in sales promotion.
Disc Code: If you enter this code in the "barcode", the discount is valid for this docket.
Auto Disc: If you tick this option, the system will deduct the equivalent amount discount as you setting in 'Docket Discount' from every docket.
Max Discount: This means the maximum discount that POS operators are allowed to give customers cannot exceed the percentage you set from here.
Delivery fee: You can set a particular amount here like $5 as delivery charge for every telephone delivery order.
Select Price in Sidebar: A price button will be shown on the right side of your POS window to let you select the price level flexibly.

4.6 Membership settings

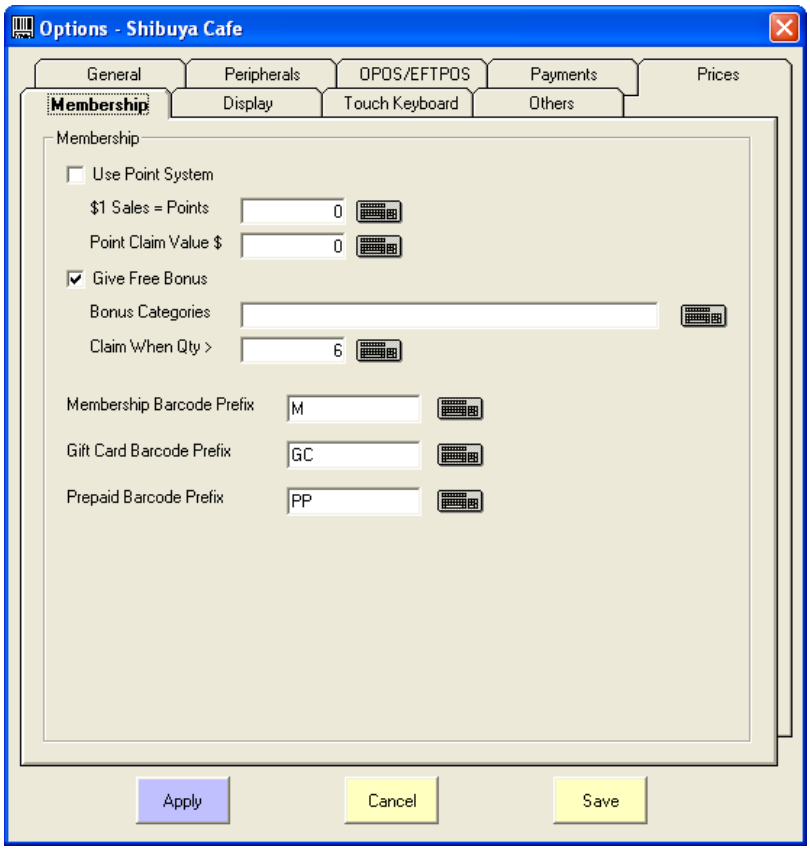


Figure 65

There are 2 options, and usually you just use one of them

- **Use Point System**
  For example, if you check "Use Point System", and set "$1 Sales = Points" as 10, and "Point Claim Value$" as 0.01, it means for every dollar the customer spends in your shop, he gets 10 points, which equals to 10 x 0.01 = 0.10 . The customer can claim it later when he buys other products.

- **Get Free Bonus**
  For example, if you check "Give Free Bonus", and "Bonus Categories" is set as "Hot Drinks", and "Claim When Qty>" is 6 , it means the 6th product the customer purchase(accumulated) in this category will be free.

Prefixes

- **Membership Barcode Prefix** : Membership holders can get points from sales.
- **Gift Card Barcode Prefix**: When the barcode entered starts with this, this card will be consider as gift card. The customer can charge whatever amount, and give the gift card to a friend.
- **Prepaid Barcode Prefix** : When the barcode entered starts with this, this card will be consider as a prepaid card.

4.7 Display

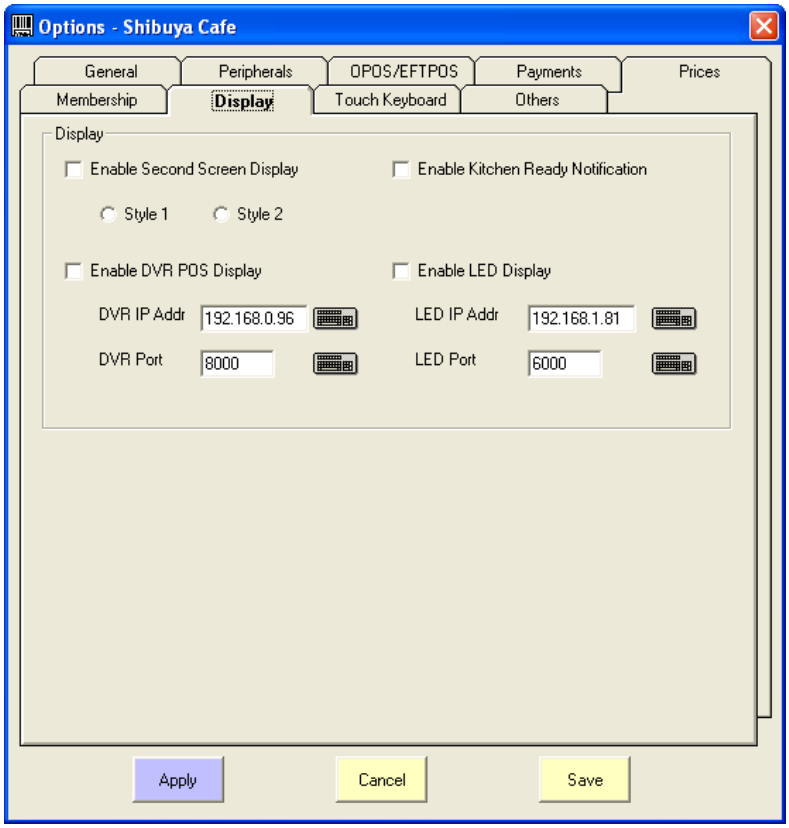


Figure 66

Enable Second Screen Display: In some shops, the POS terminal may have dual screens that one for the operator and the other faces to the customers side. The second screen display can present the sale information at the same time while operator taking orders, but also it can play some advertisements when POS terminal is idle. You have two styles to choose from for the second screen display.
Enable Kitchen Ready Notification: When the food is ready (from Kitch Touch), the number will be displayed on POS Front. (For Pro version only)
Enable DVR POS Display: The real time sales information can be shown on your DVR screen of your internal CCTV system synchronistically
Enable LED Display: You can enable LED display connecting with POS terminal. Set the 'LED IP Address' and 'LED Port' to get connected.

4.8 Touch Keypad

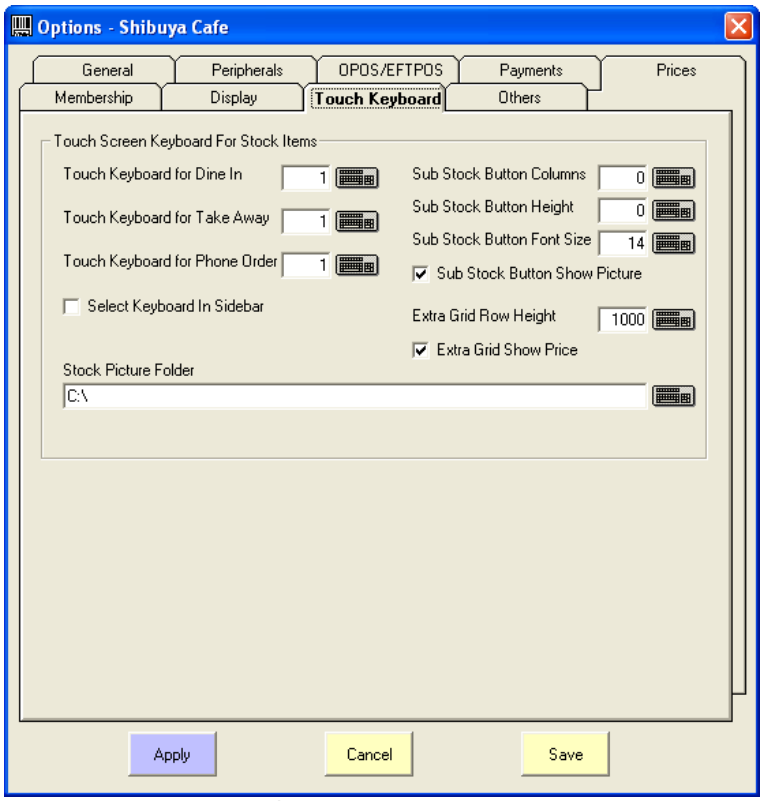


Figure 67

4.9 Others

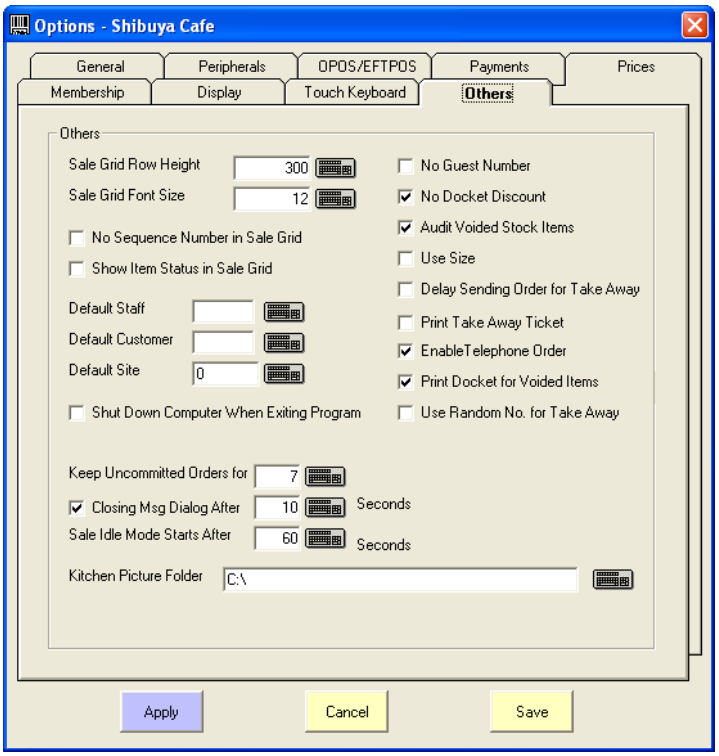


Figure 68

Sale Grid Row Height: You can adjust the sale grid row height from here. The default size is 300. You can widen it or narrow it by changing the value of it.
Sale Grid Font Size: You also can adjust the font size to make it bigger or smaller by altering the value of font size to make it greater or lower than the default size 12.
No Sequence Number in Sale Grid: There is no sequence number in the front of each single item in the sale grid.
Show Item status in Sale Grid: Whether the item has been sent to the kitchen or not, you can identity from the text colour on the screen.
Default Staff: Input the default staff number in here. The system will recognize this staff as the logged on staff no matter who log into the system while POS opening.
Default customer: If no customer is entered, use this default customer.
Default Site: If your premise has been divided into more than one site in the POS as the dining in area, you can put the name of the most frequent one here as the default site. The system will bring you to this site when you click the 'Dine In' button.
Shut Down Computer When Exiting Program: The computer will shut down automatically when you close the program.
Keep uncommitted orders for: Keep it for certain seconds.
Closing MSG Dialog after _ seconds: The system will close the message dialogue box after indicated time period.
Sale Idle Mode starts after _ seconds: The system will go back into the idle mode in a indicated time period.
Kitchen Picture Folder: You can define your kitchen picture path from here.
Add Group Line for Kitchen Docket:
No Guest Number: Only for 'Dine in' mode. When you press the 'Dine in' button, there is no guest number window coming out.
No docket discount: The docket discount function is disabled.
Audit Voided Items: All the items, which are voided by operator from the system, will be audited automatically into database.
Use Size: The size option can be displayed on the
Delay sending orders for take away: If you have a lot of orders going to the kitchen, the system will send the take away orders after dining orders.

Print take away ticket: The printer will print out the take away tickets for take away orders by enabling this option.
Enable Telephone Order: You can enable or disable the telephone order function from here.
Print Docket for Voided Items: When you delete any sent items from the system, the printer will print out those items automatically.
Use Random No. for Take Away: The take away order number will be ranked in desultory.